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# Unlocking the Potential for Every Teacher to Lead: A Phenomenological Study of Informal Teacher Leadership

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# Unlocking the Potential for Every Teacher to Lead: A Phenomenological Study of Informal Teacher Leadership

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**Approvals**

*In the judgment of the following signatories, this Dissertation meets the academic standards that have been established for the Doctor of Philosophy degree.*

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## ABSTRACT

This qualitative study of informal teacher leaders used a phenomenological method of research to investigate the lived experiences of teachers who have led in schools without a formal title or position of leadership. The study used a mixed methods approach to gathering data including a survey of 111 secondary educators in Eastern Massachusetts and 10 interviews with informal teacher leaders at the high school and middle school levels. The study inquired about how informal teacher leaders understand the concept of teacher leadership, what motivates and prepares them for leadership, the factors and conditions that encourage or discourage engagement in informal teacher leadership, and their accounts of how they exercise leadership and the impact of their leadership on their communities. The analysis of the data led to six findings that illuminated the phenomenon of informal teacher leadership. This study found that informal teacher leadership is unique both in the ways in which it emerges from within teachers who see reason to advocate for ideas they find meaningful and in the ways that colleagues regard and reinforce these initiatives. Informal teacher leaders have certain dispositions that contribute to their likelihood of inhabiting a leadership stance such as being passionate, inviting, right-minded, and bold. These teachers are primarily motivated to improve both their students' learning and their relationships with colleagues. They demonstrate a desire to work collaboratively in service of improving their school communities and acquire their leadership skills through indirect and informal methods. Informal teacher leaders in this study also concluded that formal leaders play an integral part in encouraging and enabling leadership behaviors in teachers. The implications of this study reveal that teachers are capable of acting as powerful leaders who have positive impacts on their schools and that formal leaders are important partners in advocating for shared leadership between administrators and teachers. In

addition, having more time designated for teachers to learn about their potential power as informal leaders would be beneficial for all educators, even those in pre-service learning programs.

*Key words*: informal teacher leadership, non-positional teacher leadership, teacher leadership, shared leadership, leadership stance

# ACKNOWLEDGEMENTS

I was surprised and thankful that over 100 educators in Eastern Massachusetts were willing to respond to the survey that began this project. I am eternally grateful to the ten interview participants who gave up their free time to meet with me and talk about their experiences. Without them, this study would not have been possible. This dissertation shows that they are incredible leaders inside and outside of their classrooms.

Four years ago, when I decided to enroll in a doctoral program, I started a new teaching position in the alternative, democratic program within my high school, where I went from Ms. Martin to Jen. There, I joined a cohort of seven educators committed to the crazy experiment of sharing power with their students. Relearning how to teach was not easy, but it was via this transition that I felt most inspired to learn how to truly operate in a democratic environment and subsequently began to see leadership through a democratic lens. Dan Bresman and John Andrews were especially important in helping me stay sane and encouraging me to keep a healthy work/life balance during this seemingly impossible task. It is our covert snack times and lunch breaks that makes me so grateful to come to work every day with such caring and loving colleagues.

My incredible dissertation committee provided me with two years of constant encouragement and feedback. Judy Conely's attention to detail and ability to elevate my voice encouraged me to actually seem scholarly by the end! Polly Atwood's precise comments are what I aspire to be able to write on my own students' papers. She cheered me on and pushed me in exactly the right way. My advisor, Paul Naso, is like an email cowboy, the fastest responder in the country. Paul's excitement for my topic and his unwavering support and detailed feedback made me feel like it was actually possible to accomplish this endeavor.

When I felt myself losing momentum I often thought of my father, who did not live to see me complete this dissertation. He, along with my mother, gave me their steady support to pursue my doctorate. I know that he would have been very interested in discussing the ideas and findings that my research uncovered. My desire to make my parents proud and the memory of my father's encouraging Van "isms" ran though my head weekly when I would sit down to write or research.

When I started this adventure, my kids were four and eight. There were many weekends and nights spent waiting for me to finish writing a paper or working on this dissertation. Thank you to Margot and Graham for always cheering me on. My biggest thanks are reserved for my best friend and wife, Whitney Wilson, who acted as my personal librarian, editor, babysitter, cheerleader, and shoulder to cry on. No one has been more supportive of me and given up so much for me to achieve this life-long dream.

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# CHAPTER ONE: INTRODUCTION

To many, teaching is a stagnant profession: veteran teachers find themselves completing the same tasks as the newly hired teacher with very little variation in job responsibilities between the years of service (Helterbran, 2010). Ten years into my own career, I was relieved to find that I still loved teaching history and working with teenagers; however, many of my contemporaries had already enrolled in administrative programs or were looking for a way to "move up" in their educational settings. In many countries, including the United States, there is an entire industry devoted to leadership certification and training in order to fast-track teachers into administrative positions (Fitzgerald & Gunter, 2008). These programs are often billed as a natural progression in a teacher's career; in fact, many educators view administrative leadership as a promotion from teaching. The special value placed on becoming an administrative leader is also evident in the fact that administrative leaders are compensated with high salaries (Helterbran, 2010).

Administrators at my high school assumed that I, too, would want to move into leadership (administrative) positions, mostly because I have often volunteered to work on school-wide committees and initiatives. Over the past few years, with each new administrative position posted, I failed to work up the desire to apply; I started to wonder why I was not motivated to enter into a traditional leadership position. I balked because, I do not think being an administrator is the same thing as being a teacher. While moving into administrative positions can be seen as a promotion and a natural step up from teaching, from my perspective, the two jobs could not be more different. While I do not doubt that both jobs are critical to the operation of a school, there is irony in the fact that the only way for a teacher to find professional advancement is in a different sphere of the education profession.

It was this conundrum that provoked me onto an unlikely path of pursuing a Ph.D. in educational leadership, with the specific purpose of investigating leadership within the teaching profession. I knew I did not want to be an administrator; I also knew that I wanted more for myself than teaching the same content every year, in the same classroom, slowly finding myself clocking in and out with the jaded expression I saw in some of my older colleagues. The reaction of my own colleagues and friends in finding out that I am in a Ph.D. program is telling. When they discover that I am in an educational leadership specialization, colleagues immediately assume that I am planning to apply for principal or superintendent positions. Most recently, a fellow teacher mentioned to me that I could potentially become the new department chair, especially considering how close I was to earning my advanced degree. When I explained that my program was not a certification program and that *all* I would leave with was a degree and no certification for administrative positions, she asked in shock, "why would you do it then?" It was incomprehensible to her that I would spend this much time and money earning a degree that would not allow me to "move up" in our profession. When I add that my interest is not in formal administrative positions, but rather teacher leadership and, specifically, informal or non-positional leadership of teachers, I often get blank stares.

With the encouragement from scholars and educational literature, schools across the country have adopted the premise that teacher leadership is good for schools (Teacher Leadership Exploratory Consortium, 2012); however, in my anecdotal experience many educators do not understand the power of teachers as leaders when compared to their administrative counterparts. The teacher leadership (TL) literature supports my own experience in this area. Helterbran (2010) wrote succinctly, "Despite the many calls for teacher leadership in the literature over the years, the message has not reached teachers themselves in any large

measure. School improvement ultimately will depend on teacher leadership—a factor largely untapped in schools today" (p. 363).

While I agree with Helterbran (2010), that teachers are not always empowered to practice teacher leadership to the same extent that scholars study it, I also believe that teachers do practice it every day, without giving it a formal title. This is the power of informal teacher leadership (ITL). When I discuss with other teachers my research interest in non-positional leadership, I ask if the educator works with any teachers who they would consider leaders, but who do not have any official source of power. At that point, there is usually a moment of understanding and I have yet to find a teacher who cannot name a colleague who fits that description. Informal leadership is a phenomenon that exists in most organizations, and schools are no exception (Pielstick, 2000; Larsson, Segersteen & Svensson, 2010; Miner 2013). In schools across the country, teachers are leading. Teachers are leading without any formal titles, and they are exerting their power and influence over their colleagues and school communities (Fitzgerald & Gunter, 2008; Fairman & Mackenzie, 2015). As a teacher who has both practiced informal teacher leadership and admired other non-positional teacher leaders, I know that there is great potential in this type of leadership, yet very little research exists to distinguish this form of teacher leadership (Struyve, Meredith & Gielen, 2014).

## Statement of the Problem

The hierarchical nature of governance within schools has led to a narrow definition of leadership that focuses almost entirely on the traditional roles of school leaders (Wasley, 1991; Murphy, 2005; Crowther, 2009; Fairman & Mackenzie, 2015). Most public schools follow a top-down model of leadership with the CEO/principal at the top and classroom teachers near the bottom of the power structure (Fairman & Mackenzie, 2015). While there is no question that

administrative school leaders have a deep impact on whether a school is running successfully (Leithwood, Harris & Hopkins, 2004), the limited focus on a problematically small number of leadership roles in schools excludes teachers. Teachers are the largest number of adults that have the greatest impact on students, but they often lack the positional authority to enact leadership in their schools (Fitzgerald & Gunter, 2008; Fairman & Mackenzie, 2015). Principals are the perceived leaders of schools because of an entrenched hierarchical view of leadership and because the potential of teacher leadership remains ambiguously defined. Both teachers and administrators are unsure how teacher leadership might fit into the traditional hierarchy of power in schools.

The complex 21st century school seems nearly impossible for one person to lead. Principals are often overwhelmed by the demands of the job and challenged to engage in the work of planning innovative solutions to school problems alone (Berry, Byrd, & Wieder, 2013). Simultaneously, experienced teachers find themselves in a flat profession that offers little room for upward mobility and development beyond the classroom (Wasley, 1991; Danielson, 2006; Struyve, Meredith & Gielen, 2014). All school personnel are looking for ways to innovate and find creative solutions that will improve teaching and learning, and this can begin to be accomplished by expanding the definition of leader within the educational system. Administrators need help in balancing all of their demands, and teachers are an underutilized source of leadership.

Teachers are the key to successfully implementing reform within schools (Murphy, 2005; Danielson, 2006; Hanuscin, Rebello & Sinha, 2012). While many authors have advocated for more teacher leadership positions in schools, most of the scholarship and research on the subject is focused on formal teacher leaders (York-Barr and Duke, 2004; Fitzgerald & Gunter, 2008; Lai

& Cheung, 2015; Wenner & Campbell, 2017). These are teachers who are given titles, time, and/or defined duties and in some instances, additional compensation for their leadership roles. Nevertheless, formal teacher leadership is not the only form of teacher leadership, nor is there reason to conclude it is the most consequential form of teacher leadership. In fact, many formal teacher leaders report feeling isolated from their colleagues and believe that they are viewed with suspicion because of their formal leadership roles (Childs-Bowen, Moller & Scrivner, 2000; Frost & Harris, 2003; Fitzgerald & Gunter, 2008, Helterbran, 2010; Struyve, Meredith, Gielen, 2014; Fairman & Mackenzie, 2015). It stands to reason that there is cause to investigate a form of teacher leadership that does not require formal approval or acceptance from the administration in schools and that originates from the teachers themselves. Informal teacher leaders are granted their leadership status by their peers and are given an immediate source of legitimacy because they remain grounded in their role as a teacher and are respected for that choice (Poekert, Alexandrou & Shannon, 2016).

## Purpose of the Study

A multitude of research studies have examined the role of teacher leaders in schools across the world (York-Barr and Duke, 2004; Struyve, Meredith, & Gielen, 2014; Wenner & Campbell, 2017); this study focused solely on occurrences of informal teacher leadership. Although authors have described teacher leadership responsibilities that include behaviors that could be described as informal, very little literature exists on the question of informal teacher leaders as a separate, and equally important, version of teacher leadership (Whitaker, 1995; Danielson, 2006 Collinson, 2012; Fairman & Mackenzie, 2015; Huang, 2016).

Informal teacher leadership is, arguably, the most organic and natural form of teacher leadership. In order to be an informal teacher leaders, a teacher must be motivated to pursue a

purpose that will benefit their teaching and student learning. They must be willing to act on their goals, without the benefit of formal recognition, whether in the form of monetary compensation, official title, or time off from their other duties. The influence that informal teacher leaders possess is almost entirely based on their standing among their colleagues. The literature on this point is clear, informal leaders derive their power in the most democratic way possible (DeRue & Ashford, 2010; Larsson, Segersteen & Svensson, 2010; Miner, 20130; Fairman & Mackenzie, 2015; Hunzicker, 2017). They must convince their followers that they are worth following.

Nevertheless, there is a lack of research studies that examine the claims that teacher leadership is beneficial to schools. Struyve, Meredith, & Gielen (2014) studied twenty-six Flemish teacher leaders to learn more about the validity of claims made by scholars who promote the concept of teacher leadership and its various benefits. In the conclusion of their article, the authors offer the following advice, "The field needs a greater understanding of teacher leadership by examining how those practices really take place and how these practices are perceived by the teacher leaders involved" (p. 207). While Struyve et al.'s study adds to the formal teacher leadership literature, it also raises new questions about informal teacher leadership. Their research revealed that due to the egalitarian philosophy at the center of the profession, many teachers were uncomfortable with their formal titles; some even felt that their colleagues did not appreciate their leadership because the roles were imposed by the traditional leaders of the school, creating a sense that the teacher leaders were acting on behalf of the administrators. The teacher thought that this belief rendered them less effective. The purpose of my study was to explore other facets of teacher leadership that may address the concerns, such as the isolation and discomfort reported by formal teacher leaders.

Informal teacher leaders carry a unique identity as leaders within a school and little is known about this form of teacher leadership. In order to learn more about non-positional teacher leaders, I used the following research questions to guide my research:

- How do teacher leaders understand the concept of informal teacher leadership?
- What motivates teachers who have taken on informal leadership roles to create these roles in the first place and how have they gained the skills that they need to exercise their leadership role?
- What do informal teacher leaders consider to be the factors or conditions that encourage or discourage them from engaging in informal leadership?
- According to informal teacher leaders, how do they exercise their leadership and what is their perspective on the impact of their leadership on their school communities?

The answers to these questions helped to illuminate how informal leadership within schools operates and impacts the school community. As I proceed with the introduction to this study, the next section establishes the meaning of key terms that are integral to the framing of this research.

## Definition of Terms

**Formal Leadership**- This term denotes administrators and other formally recognized leadership within a school. Formal leadership titles might include, but are not limited to, principal, vice principal, dean, mentor, coordinator, coach, facilitator, chair, advisor, team leader, and department head. Each school might use a different title to identify different responsibilities. For the purposes of this study, a formal leader is any educator who is granted power through formal channels such as a job title or compensation.

**Informal teacher leadership**- Informal teacher leadership refers to teacher leadership that is exercised while a teacher does not hold any formally recognized position or title of leadership

within their school. For the purposes of this study, in order to be considered an informal teacher leader, the teacher must not hold any formal titles of leadership, and the teacher must not be receiving compensation monetarily or be given release time for the leadership activity.

**Non-positional leadership**- Frost (2012) uses the term non-positional leadership to describe teachers with no positional authority. For the purposes of this study, non-positional leadership will be used interchangeably with informal teacher leadership.

**Teacher Leadership**- The literature and research regarding teacher leadership lacks an agreed upon definition of a teacher leader. York-Barr and Duke (2004) explained that, "a major dilemma in trying to make sense of the literature is its diverse nature" (p. 3). The simplest characterization of teacher leadership is offered by Barth (2001) who shared his preferred definition by writing: "One definition of leadership I like very much is: 'Making happen what you believe in.' Teachers believe strongly in many things, and those who dare to follow those beliefs and make them happen choose one of many paths available to them" (p. 446). This definition of teacher leadership removes the need for a teacher to seek an appointment as a positional leader, allowing the definition to incorporate both positional and non-positional roles. Barth's simple definition offers a flexible characterization that can apply to most existing definitions and incorporate newer concepts of teacher leaders in non-positional roles.

The following definition of teacher leaders, based on Barth's (2001), will be used in this research study: Teacher leaders are teachers who make happen what they believe in, within and outside of their own classroom.

## Significance of the Study

The literature on teacher leadership clearly delineates the positive impact of sharing leadership between administrators and teachers (Muiji & Harris, 2003; York-Barr and Duke,

2004; Muiji & Harris, 2006; Pounder, 2006; Wenner & Campbell, 2016). Teacher leaders gain a deeper understanding of their actions and renewed commitment to their school communities and profession (Cameron & Lovett, 2015). According to Harris (2005) teacher leaders

- form strong relationships with their colleagues and the larger community,
- develop into instructional leaders,
- report positive professional growth and job satisfaction, and
- contribute to a positive school culture of shared decision-making.

However, some scholars question the use of formal teacher leaders as being truly innovative or alternative ways of sharing leadership (Hatcher, 2005; Fitzgerald & Gunter, 2008; Frost,2012; Fairman & Mackenzie, 2015). Fitzgerald & Gunter (2008) suggested that when teachers are labeled as leaders, they run the risk of being absorbed into managerial and administrative roles. Formally labeling teachers as leaders could lessen their power as change agents, by simply incorporating them into the administrative fold and diminishing their unique perspectives.

This study has the potential to illuminate the impact of informal teacher leaders. While scholars such as Barth (2001), Danielson (2006), Fitzgerald & Gunter (2008) and Frost (2012) touted the potential benefits of non-positional teacher leadership there are very few studies that focus solely on these teacher leaders. When leaders share and distribute power among more members of the school community rather than relying entirely on a few sanctioned leaders, they create the possibility of building a more democracy-based leadership structure (Blengen & Kennedy, 2000, Barth, 2001; Frost & Durrant, 2003; Hatcher, 2005; Harris, 2005). This study offers new insights into democratic forms of leadership in order to understand its potential impact on schools. Understanding the power of informal teacher leaders could harness a less understood form of leadership that might empower more stakeholders to contribute plans for

improvement within schools. Childs-Bowen, Moller & Scriver (2000) wrote that when teachers are enabled to lead they "empower stakeholders to participate in educational improvement" (p. 28). Possible groups that might benefit from this study include: teachers, administrators, students, parents, teacher and administrative preparation programs, as well as other stakeholders within the field of education.

The consequences of not understanding more about the role of informal teacher leaders are varied. Many teachers do not readily adopt the idea of leadership titles, as the roles are sometimes associated with managerial tasks and upset the egalitarian balance that is associated within the teaching profession (Fairman & Mackenzie, 2015). While schools across the country embrace the idea of increasing formal teacher leadership positions, it is possible that the trend is simply creating another class of administrators, rather than encouraging teacher agency in decision-making (Fitzgerald & Gunter, 2008). Teachers themselves may not fully understand their own potential to lead and make positive impacts on their wider school communities (Harris, 2003). When teachers are restricted to limited roles and cannot see their own prospective impact as leaders, the school community is robbed of a potentially powerful source of talent and energy (Helterbran, 2010). If the concept of teacher leadership were better understood and appreciation of its relevance to all teachers expanded, it might be possible for more teachers to have the potential to lead with confidence.

## Delimitations of the Study

I delimited this study in several ways. Participants in this study were limited to high school and middle school teachers due to my familiarity with these two environments. In order to conduct semi-structured interviews with participants, a working knowledge of the teaching environment was critical to my ability to engage appropriately and ask more in-depth follow up

questions, rather than spending too much time seeking clarification. Having taught in both middle school and high school settings, I was more attuned to subtle variations in the descriptions of the work environment for this group of teachers.

It is important to note that the informal teacher leaders were self-identified through the initial survey, which included demographic questions and a question about their current status as a formal or informal teacher leader. If participants responded that they were currently not in a formal leadership position within their schools, they were asked to answer a series of questions that sought their understanding of teacher leadership behaviors and what motivated them to pursue informal leadership roles. Teachers who answered the survey questions in a way that identified themselves as engaging in leadership behaviors, informally, were then considered possible interview subjects. I did not seek to generalize my conclusions, as I might in a large-scale quantitative study, because the data were only told from a selected cohort of teacher interviews.

While informal teacher leadership is a component of the teacher leadership literature and is closely linked to formal teacher leadership, this study did not seek to obtain data on formal teacher leaders. Some informal teacher leaders in this study have had formal teacher leadership roles during their career, however the focus of this study was entirely on informal leadership behaviors and attitudes. The survey instrument ensured that participants were aware of the focus of this study and included a place for formal leaders to identify themselves. This allowed formal leaders to participate in the survey phase of the study by offering observations of colleagues who they considered informal teacher leaders; however, they were not permitted to offer data on their own roles as formal leaders and they were not offered an opportunity to participate in the interview phase of the study.

## Theoretical Orientations

Teacher leadership literature formed the foundation of my research and was a source of strong building blocks for my examination of informal teacher leadership. Scholars of educational leadership have not always referred to teacher leadership by that name, although they have been promulgating the idea of shared leadership between teachers and administrators well before the term "teacher leadership" appeared regularly in the lexicon of educators (Hargreaves, 2009). Still, a small number of scholars did use the term teacher leader. For example, Wasley published a book in 1991, based on her dissertation research in 1989 in which she interviewed over one hundred teacher leaders in schools around Seattle to gather educators' impressions of teacher leadership and the ways in which it was practiced in their schools. Similarly, in 1993, Whitaker conducted a study of principals who utilized informal teacher leaders to help with decision-making. In many ways, these two works present a primary source in the conceptualization of teacher leadership because Wasley and Whitaker named the type of leadership teachers were practicing; this was a form of leadership that was under-researched in the field of education.

To understand the context of this study, it is important to grasp that an evolution of the concept known as "teacher leadership" has occurred over time. Silva, Gimbert, and Nolan (2000) provided a helpful framework to describe some of the different conceptions of teacher leadership. Silva et al. used the term "wave" to describe the different ways that scholars and educators perceived the meaning of teacher leadership and explained its meaning and function. Each of these waves, or surges of interest, represents distinct arguments and theories about teacher leadership appearing in the scholarly discourse and subsequently among educators over time. In some waves, teacher leaders were the quasi-administrators who helped with managerial

tasks, such as the department chair. At other times, teachers were encouraged to become more formalized instructional leaders; this trend in thinking led schools to create roles such as mentors and instructional coaches. A focus on Professional Learning Communities offered an additional layer to the conceptualization of teacher leaders. These professional communities are often led by teachers and tackle topics that can impact the entire school community and culture (Berry, Byrd, & Wieder, 2013; York-Barr and Duke, 2004). Silva, Gimbert, and Nolan (2000) did not propose that one way of conceptualizing teacher leadership is better or more progressive than the previous. In fact, all of these waves in teacher leadership complement each other and simply provide alternative and sometimes complimentary ways of understanding teacher leadership.

Each of these leadership theories represents one of many ways teachers can advocate for improvements in teaching and learning. This study, with its focus on informal teacher leadership continues in this tradition of adding additional ways of understanding the phenomenon of teacher leadership. In some ways, this study along with other scholars who are investigating non-positional teacher leadership could be considered a separate wave within Silva et al.'s framework.

The definitions of a teacher leader changed overtime, making the concept complex in meaning and difficult to use in everyday conversations. These changing definitions were influenced by other leadership theories that were introduced even earlier than teacher leadership, but also flourished in the 1990s, alongside teacher leadership. In particular, teacher leadership fit well into the discourse of distributive leadership theories. To that end, the connections between shared leadership, distributive leadership and democratic leadership with teacher leadership are examined in Chapter Two. Theories of teacher leadership and other forms of shared leadership theories offer a limited amount of research on informal teacher leadership, specifically. This

prompted me to include an examination of organizational leadership theory to round out my theoretical underpinnings in Chapter Two. Organizational theory includes a small body of research on the role of informal leaders and their impact on organizations (Miner, 2013). I used this information, in combination with the small body of literature on informal teacher leadership to form the foundation of my understanding of the concept and to help drive my study.

Investigations into informal teacher leadership, while rare, are not entirely new. Whitaker in 1993, included informal teacher leaders in a study of shared leadership between principals and teachers. According to my review of the literature, very few scholars took up Whitaker's suggestion to study this group of teachers more closely. A decade later, only a few scholars were devoted to researching and writing more about non-positional leadership as a unique phenomenon (Barth, 2001; Danielson, 2006; Fitzgerald and Gunter, 2008; Collinson, 2012; Frost, 2012). In most of these cases, scholars pushed to expand the existing definitions of teacher leadership by included an informal version. Some authors were motivated by the concern that as the concept of teacher leadership expanded, teachers were relegated to the position of managerial helper, rather than deemed equal partners in leadership of schools (Fitzgerald and Gunter, 2008; Frost, 2012). Danielson, in 2006, dismissively described most formal teacher leaders as "administrator in teachers' clothing." These valid concerns have left some scholars to conclude that the truest form of teacher leadership is one that is informal and that empowers teachers to act on issues that they are passionate about, rather than do the work that is assigned to them.

In addition to the ideas described above, my own conceptual framework is informed by some recent work from scholars such as Smulyan (2016) and Hunzicker (2017) who both posited that teacher leadership is less of a role than it is a stance. These authors claimed that what makes

non-positional teacher leadership unique is the fact that it is not derived from a title, but rather from a "way of being" as a teacher. This allows informal teacher leadership to be entirely voluntary in nature, whereas formal teacher leaders are labeled as such and are expected to perform certain duties (Danielson, 2006). It is the voluntary nature of non-positional leadership that inspired me to learn more about this specific form of leadership that is under researched.

## Methods and Procedures

### Qualitative Research Method

I used a qualitative method of phenomenology to investigate answers to my guiding questions. This method was especially appropriate for this study as it provided me with a methodological framework to understand the lived experiences of informal teacher leaders. Informal teacher leadership acted as the phenomenon under examination. In its most basic sense, phenomenology is a qualitative method of inquiry that is rooted in a social constructionist worldview, which "…believe[s] that individuals seek to understand the world in which they live and work" (Creswell, 2014, p.8). As the researcher, it was my responsibility to look for and decipher the, "…. complexity of views rather than narrowing meanings into a few categories or ideas" (Creswell, 2014, p.8). While there exists praxis for phenomenological approaches, researchers are hesitant to outline universal techniques for conducting research. The techniques and approaches that I took for this study are outlined in detail in Chapter Three.

While some qualitative methods of research insist on constant neutrality from the researcher, phenomenology requires the researcher to acknowledge and process their own preconceived notions at every point of the research process (Groenewold, 2004). This method of research prompted me to strongly consider my own epistemology and frame of reference before I even began interacting with participants of the study, and throughout my research.

Through my analysis of the data I was able to find patterns and themes that came from the lived experiences of my participants. By employing a phenomenological approach to my research, I was able to illuminate a theory about informal teacher leadership applicable to the study's participants.

**Participants and Data Collection**

In order to find participants for my research, I sent out surveys to schools across Eastern Massachusetts. Most of the participants in this study were high school teachers and 19% were middle school teachers. One-hundred and eleven educators took the survey and ten of those teachers were interviewed in the second phase of the study.

I used an electronic survey instrument to both identify informal teacher leaders for future interviews and to learn more about the way in which teachers perceive informal teacher leadership. Using Fairman & Mackenzie (2012) criteria of the behaviors that teacher leaders demonstrate, my questionnaire help me identify the teachers who have experienced the phenomenon of informal leadership. Informal teacher leaders were teachers who demonstrate these behaviors (or had in the past) that Fairman and Mackenzie outline, without holding any official leadership position. The survey ended with a question about participants' willingness to be considered for a follow up interview.

I scheduled one-hour interviews with ten informal teacher leaders to collect additional data on the research questions. I used the same interview protocol with all of my participants. The interview protocol included twenty questions that were created to gain more insight into the experiences of these teachers and their understanding of non-positional leadership. I gathered interview data by recording my interviews and keeping observational notes as I interviewed the participants. Interviews were conducted via phone call, in person and via video-conferencing.

Audio recordings were transcribed for analysis. All participants signed informed consent forms explaining the purpose of the study.

**Analysis of Data**

In order to make sense of the interview responses, I coded the data collected and created thematic categories for analysis of the phenomenon of informal teacher leadership. Using Creswell's (2013) version of Moustakas' (1994) approach, I sought to, "…highlight 'significant statements,' sentences, or quotes that provide[d] an understanding of how the participants experienced the phenomenon" (p. 82). In doing so, I developed "clusters of meaning" (p.82) and themes emerged, revealing the experience of my participants. The analysis of the data and coding allowed me to create a textural description of what I uncovered from the participants' experiences. I was careful to go through the process of coding and sorting several times; first, by using my essential questions as an organizing principle and later, revisiting the data across the research questions. The data analysis resulted in six findings about the phenomenon of informal teacher leadership, which are explained in detail in Chapter Four.

## Outline of Chapters

This dissertation is organized into five chapters which are summarized below:

- Chapter One consisted of the introduction to the topic, statement of the problem, purpose of the study, guiding questions, definition of terms, significance of the study and delimitations of the study. In addition, theoretical underpinnings were presented to give a context of the study.
- Chapter Two encompasses a review of the relevant literature including shared and distributive leadership theory, democratic leadership theory and teacher leadership

theory. This chapter ends with a specific examination of informal leadership in both organizational theory and teacher leadership.

- Chapter Three includes an explanation of the design of the study with a description and validation of phenomenological approaches to research and analysis of the data. This chapter covers the topic of how the study was designed and executed in detail. Explanations about the survey instrument and interview protocol are included, as well as, descriptions of the participants, data collection method and storage. This chapter also explores possible biases I held as the researcher.
- Chapter Four presents the data that was collected and coded from the interviews of the informal teacher leaders. I present the data using descriptive paragraphs which also includes excerpts from interviews that demonstrate the six findings that emerged in the research and analysis of the data. Chapter Four concludes by answering the four research questions as informed by the thematic exploration of the data.
- Chapter Five includes a discussion of the findings and implications for future research within the field of teacher leadership and other possible areas of scholarship.

# CHAPTER TWO: REVIEW OF THE LITERATURE

Much scholarship has been devoted to the concept of teacher leadership over the past three decades. The idea of teacher leaders as important partners in achieving better schools is not limited to scholars. Teacher leadership has also found its way into literature published by national teacher advocacy groups, university training and certification programs, as well as in teacher evaluation criteria in some parts of the United States. It is clear that the idea of teacher leadership has permeated all levels of the American education system (Wenner & Campbell, 2017).

In order to understand the context of this study on informal teacher leaders, it is important to explore the varied and sometimes conflicting definitions of teacher leadership that are offered within the literature, while also providing a historical context and understanding of the concept in educational scholarship. Teacher leadership is now an accepted concept both among scholars and within schools, but its definition remains somewhat elusive. In a recent literature review of teacher leadership from Wenner and Campbell (2017), their analysis demonstrated that relatively little empirical data exists on teacher leadership, making it something that is written and talked about often, but studied much less. Before fully describing the landscape of teacher leadership literature, shared and distributive theories of leadership will be addressed to help frame and understand the reasons articulated for encouraging teacher leadership in schools. Later in the chapter, special attention is paid to literature that focuses on non-positional forms of leadership as explained in organizational theory and teacher leadership.

## The Need for Democratic Leadership in Schools

John Dewey's (1916) description of the "democratic ideal" in his book *Democracy and Education* explained how schools and education offer an important service to a democratic

society (p. 101). He explored complex, constantly changing societies full of diverse peoples who are in continuous contact. Dewey warned that, "a society which is mobile, which is full of channels for the distribution of a change occurring anywhere, must see to it that its members are educated to personal initiative and adaptability" (Dewey, 1916, p. 102). Otherwise, Dewey cautioned, the members of society can become fearful and overwhelmed by the changes that confront them, making democratic societies more susceptible to tyranny.

Faced with the problem of keeping democratic societies vibrant and flexible enough to adapt to perpetual changes, Dewey's solution was to create schools that encourage democratic values and prepare each generation to operate within a democratic society. Yet, the very schools that are meant to demonstrate the democratic spirit and ideals Dewey was referring to, are in-and-of themselves, undemocratic and hierarchical. Democracy is rarely practiced within schools (Barth, 2001; Blegen and Kennedy, 2000; Carlson, 2011; Bailey, 2014). The American educational system is structured in a way that allows administrators to fill the single role of leader without much thought to demonstrating democratic styles of leadership. While democratic societies are constantly evolving and changing, the structure of leadership within their schools has largely remained stagnant since the early 20th Century (Ghamrawi, 2013), when Dewey wrote *Democracy and Education*. Cuban (1988), noted that schools themselves have been undergoing reforms for over a century, and yet they have changed very little over time; leadership in schools has remained the same since the turn of the 20th century, with superintendents and principals as the positional leaders of schools.

The hierarchical nature of governance within schools has caused the field of educational leadership to narrowly define leadership by focusing almost entirely on the traditional roles of school leaders (Wasley, 1991; Murphy, 2005; Danielson, 2006; Crowther, 2009). While

significantly more research has begun to emerge on the potentially beneficial impact of teacher leadership on schools, this research is limited and dwarfed by the amount of work focusing on traditional leaders of schools (Wenner & Campbell, 2017). This limited focus on a small number of leadership roles in schools is problematic because it excludes the largest number of adults that have the greatest impact on students: the teachers.

Teachers have traditionally been celebrated as leaders of their classrooms. In this role, teachers exercise leadership over their students, but rarely outside the walls of their classroom (Murphy, 2005). This lack of positional authority for teachers sometimes prevents administrators, scholars, and even teachers from seeing the potential in expanding leadership opportunities for educators (Wilson, 1993; Pucella, 2014; Hunzicker, 2017). Having very few opportunities for teachers to lead reinforces the traditional hierarchy of the principals as the true leaders of schools because the potential of teacher leadership remains invisible and under researched. Using more democratic and distributive forms of leadership that encourage teachers to exercise leadership within their schools has the potential to (a) help administrators answers the complex challenges that face them, (b) increase teacher satisfaction in their own work beyond the classroom, and (c) encourage teachers to take a more active role in improving teaching and learning for students.

Ignoring the potential power of teacher leadership, or simply relegating teachers to managerial helpers, does a disservice to students because teachers are the adults who have the most contact with students and understand the needs of the student body and the school, as a whole. Even the conceptions of teacher leadership that have been offered are narrowed to program leaders, coaches, mentors and other positions that are firmly entrenched in the traditional hierarchy of schools. While these roles are important, there is a pool of potential

informal leaders who also deserve recognition and further research on their contributions to education (Bangs & Frost, 2015). There is little hope in breaking the cycle of ineffective reforms that Cuban wrote about in 1988 and continues today, if new ways of conceptualizing leadership are not imagined. Realistically, it is teachers who stand at the gates of reform. While traditional, positional leaders may have ambitious and creative ideas for improving their schools, it is the teachers who will be asked to implement the ideas. It is simply good sense that teachers should be at the center of and helping lead all reform efforts (Murphy, 2005).

## Historical Context

Teachers in leadership roles have existed since the first schools were established. In fact, in most parts of the United States during the 19th Century, the one-room schoolhouse was entirely led by the teacher (Nelson, 1983). Even as cities and schools grew throughout the early and mid-twentieth Century in the U.S. and the role of principal was introduced, many principals were "as often a teacher with administrative responsibilities as an administrator who supervises teachers. These early principals were flexible teacher leaders who maintained a close connection with classroom work and school community" (Rousmaniere, 2013, p.5). Rousmaniere explained that, as the role of principals went through a period of professionalization in the mid-twentieth Century, there was a new emphasis making the principalship distinctive as an administrative job. This change, in turn, also redefined the teacher as the follower and the principal as the official leader of a school. Rousmaniere wrote that this more definitive view of the principal's job "formalized the division between teachers and administrators, between doing education and supervising education, between classroom and office, body and mind, experience and intellect" (p. 6). The fallout of this reimaged definition of the principalship had serious consequences on the role of the teacher. Teachers were no longer seen as potential leaders of their schools. As the

principal settled into their office at the front of the school, teachers retreated into their isolated classrooms, with much less involvement in the management or leadership of their schools.

By the 1980s, some critical studies, including Goodlad's (1984), *A Place Called School*, emerged about the American classroom experience that shed light on the less-than-ideal conditions that teachers were working under in classrooms across America. In addition to having little support or growth within their profession, schools emphasized coverage and rote memorization. By the late 1980s, there was a clear sense that the American education system needed to be restructured and reformed in order to improve teaching and learning (Wasley, 1991). This is when the first calls for increased teacher leadership began to emerge in national reports. For example, the Carnegie Commission (1986) recommended that teachers have more autonomy, professional development opportunities and lead teacher positions. Wasley explained that reports like these also emphasized a need for greater collaboration among teachers and an overall professionalization of teaching that would put them at the center of educational reforms. Initiatives starting in the 1980s began the process of professionalizing teaching and validating teacher knowledge and expertise. By the mid-1990s, national educational organizations began promoting the idea of a shared approach to leadership that would include teachers as key players in school reform (York-Barr and Duke, 2004).

Even as mainstream research studies drew attention to the need for teachers to open the doors of their classroom and form more collaborative communities with their colleagues, academia still ignored the potential of teachers as leaders. Hargreaves (2009), remembered getting a job as a lecturer in an education department in the late 1980s, because his area of focus was teachers, which meant he was not a threat to his colleagues who all studied educational leaders. The implication being that teachers were not educational leaders, and therefore

Hargreaves would not compete with their research. As he put it, "the field of educational administration that would in many places later evolve into educational leadership had little or no place for research on teachers and teaching—except where teachers got in the way of administrators' plans" (Hargreaves, 2009, p. viii). While the term teacher leader began appearing in educational reports and recommendations in the late 1980s, it was not until the 1990s that scholars began seriously considering the concept of teachers as educational leaders (Wasley, 1991; York-Barr and Duke, 2004; Hargreaves, 2009).

In some cases, scholars of educational leadership did not refer to teacher leadership by that name. Hargreaves (2009), for example, believed he was writing about teacher leadership (or the precursor to teacher leadership) in the 1990s, by advocating for more shared leadership from principals and encouraging collaboration between teachers and administrators. He recalled, "again, although we did not pose it in these words, we were trying to grow more teacher leadership across schools and systems" (p. ix). Still, some scholars did use the term teacher leader. Wasley (1991) published her book *Teachers Who Lead: The Rhetoric of Reform and Realities of Practice,* based on her dissertation research in 1989 in which she interviewed over one hundred teacher leaders in schools around Seattle. In many ways, her book presents a primary source in the conceptualization of teacher leadership. Her descriptions clearly reflected the state of teaching in the late 1980s and early 1990s. Wasley wrote about how teachers were not given the opportunities to make their own professional judgment to drive their teaching.

> In the existing hierarchical system, teachers do have the capability to make professional decisions in the best interests of their students. Nor have they developed their own knowledge base. Nor have teachers worked together to determine the standards for

> credentialing or for measuring the efficacy of their work. These conditions cripple teachers' capacity to improve schools on behalf of student learning. (p. 18)

Reading this excerpt in 2018, it is easy to argue that teaching has come a long way from this view; however, some of these claims still ring true. Schools continue to operate in a hierarchical system that prevents teachers from being able to reach their true leadership potential (Danielson, 2006). Through stronger teacher preparation programs and better professional development, teachers are better prepared and trained to make wise decisions for their students and the larger school community; the issue is whether they are permitted to act. In the era of standards and standardization, teachers have less ability to plan and implement innovative ideas in their classrooms and beyond. While collaboration is encouraged in most schools and professional development is understood to be a critical component to any teacher's career, standardization has created an environment in which collaboration is often mandated and contrived, leading teachers to retreat from leadership roles (Hargreaves, 2009). Perhaps ironically, Hargreaves noted that teachers seem more drawn to leadership within their unions in order to fight the standardization movement that is being imposed on them, rather than leading alongside their administrators.

Even with the aggressive standardization movement and increasing national, state, and local control of schools, there have been demonstrable ways of conceptualizing teacher leadership beginning in the 1990s. Silva, Gimbert, and Nolan (2000) described an evolution of conceptualizing teacher leadership in schools as three major waves. While these conceptualizations of teacher leadership do seem to have some chronological momentum, it is important to note that as each new wave of teacher leadership emerged, it did not replace the previous wave. Each new trend in describing teacher leadership added to a growing body of literature on the topic.

In the first wave, teacher leaders first appeared in quasi-administrative roles to help run and manage aspects of the school that the principals could not or did not want to perform. These positions were usually directly related to curricular content, with teachers serving as curriculum coordinators and department chairs. Teachers looked for opportunities to serve as leaders within their own unions to further the work of improving teaching conditions. After teachers took on managerial roles, a second evolution of thinking about teacher leadership emerged that encouraged teachers to take on instructional leadership roles. Most school systems now include mentoring programs for new teachers, where a veteran teacher is assigned to guide and nurture a novice teacher through their first years. In addition to mentoring, positions such as literacy coaches and chairs of curriculum committees or workshop leaders began appearing in most school systems across the country, which are all included in the second wave (Silva et al., 2000).

The third wave, which Silva et al. (2000) described as emerging, included a less defined role or job for teacher leaders. A new trend of implementing Professional Learning Communities (PLC) led to some concrete gains in teacher leadership, because most PLCs are led and run by teachers. The goals of most PLCs are more comprehensive than simply improving instruction in an individual teacher's classroom. PLCs tackle issues of school culture and school improvement, in addition to inspiring excellence in teaching (Berry, Byrd, & Wieder, 2013; York-Barr and Duke, 2004). Teachers leading PLCs was an example of the newest wave in teacher leadership in which teachers were encouraged to work beyond their classroom to reculture their schools and improve teaching and learning. Silva et al. (2000) did not propose that one way of conceptualizing teacher leadership is better or more progressive than the previous. Each theory of how a teacher can exercise leadership in her school is logical and represents one of many ways teachers can advocate for improvements in teaching and learning.

As each of these three waves of teacher leadership emerged, the definitions of a teacher leader evolved and changed, making the concept more difficult to delineate. These changing definitions were influenced by other leadership theories that were introduced and flourished in the 1990s, alongside teacher leadership. In particular, teacher leadership fit well into the discourse of distributive leadership theories. Although theories of distributive, shared and democratic leadership were being applied in many settings outside of schools, the research on sharing leadership, pointed to the possibility of rationalizing what Wasley (1991) suspected in her dissertation, that teachers leading in schools would have a positive impact on their school organization.

## Shared Leadership Theories

The literature and research regarding teacher leadership offers a variety of definitions that can be applied to a teacher leader. York-Barr and Duke (2004) explained that, "a major dilemma in trying to make sense of the literature is its diverse nature" (p. 3). Wigginton (1992) as cited in Murphy (2005) pointed out, "The issue of teacher leadership is devilishly complicated. And it doesn't help matters that the phrase itself is frustratingly ambiguous" (p. 8). While it is challenging to find a single definition of teacher leadership that everyone can agree on, it is still a concept worth investigating. In response to critics of the larger topic of leadership theory, Gronn (2000) wrote, "the fact that commentators cannot agree upon a set of behaviors that amount to leadership, and that their researches have produced inconclusive results, does not constitute an argument for jettisoning the concept altogether" (p. 321). The same is true for teacher leadership. The act of cataloging and categorizing the variety of definitions for teacher leadership helps to create a lexicon for the concept and while there is no single, agreed upon meanings of a teacher leader, there are many similarities among the diverse definitions. In order

to understand the definitions of teacher leadership, it is important to explain and understand the context in which teacher leadership exists within the larger educational leadership body of literature.

It is generally agreed that schools need strong leaders (Hallinger, 2011). There are enumerable complexities in running a school with a diverse student body and managing the faculty that will provide enriching learning experiences to those students. It is impossible for one person to take responsibility for running a modern school (Lindahl, 2008). Traditionally, principals have been looked to as the supreme figure who is charged with managing, motivating and empowering work that is done inside and outside of the classroom (Spillane, Halverson, and Diamond, 2004). Of course, there have been principals that have been able to run a school by the sheer power of their charismatic and forceful personality or persona, but Fullan (2001) pointed out that there is a danger in believing that this style of leadership is what is needed to institute reforms in a time of change. In fact, he warned that these "superleaders" can harm an organization in that they (a) create a passivity in their followers because they do not distribute leadership among many people and so the organization never learns to solve problems without the leader, and (b) the leader cannot serve as a role model for leadership because their unique charisma and leadership cannot truly be replicated (p. 1-2). Instead, Fullan wrote, "deep and sustained reform depends on many of us, not just on the few who are destined to be extraordinary" (p. 2). The ideal leader understands that she must share roles and responsibilities with her followers.

To understand the unique concept of teacher leadership, it is helpful to examine the theories within educational leadership that typically focus on positional school leaders, such as principals or superintendents (Gronn, 2000), but that have in recent years moved to include a

much wider examination of people within school organizations. Spillane et al. (2004) provided a helpful and concise review of literature on education leadership theory, which began by defining traits that successful leaders should have in order to effect change in their organization. These works typically addressed administrative leaders. These positional leaders were encouraged to acquire and hone qualities, such as self-confidence and sociability, in order to improve their leadership. In order to expand the definition of leader and go beyond personality traits, scholars began investigating behaviors exhibited by leaders, such as monitoring, consulting or delegating. Scholars then broadened their study of leadership by including a framework of leadership that portrayed leadership as a dynamic "organizational quality" (Spillane et al., 2004, p. 6). Essentially, leadership is not exclusively comprised of the qualities and practice of one individual, but of a whole host of circumstances and contexts that interact to create a complex perspective on leadership theory.

The focus on the single leader no longer stands as the model for understanding leadership in schools. Spillane et al. (2004) wrote, "building on recent work in distributed and situated cognition and activity theory, we argue that leaders' practice (both in thinking and activity) is distributed across the *situation of leadership*, that is, it emerges through interaction with other people and the environment" (p. 8). Believing that leadership is not the act of one person has opened up a number of theories that are developed around the idea that leadership is more successful if it is shared among members of the organization. Harris (2005) explained that, "current efforts to redefine leadership are rooted in notions of distribution and in the acknowledgement that leadership permeates organizations rather than residing in particular roles or responsibilities" (p. 202) of one individual.

Teacher leadership is a natural outgrowth of a variety of leadership theories, including distributive, shared, and democratic leadership. While teacher leadership theory has amassed its own growing body of literature, the roots of this concept began within the framework of other leadership theories. Many articles on teacher leadership are couched in theories of distributive or shared leadership and operate on the premise of democratizing leadership within schools. These theories help to frame the definition of leadership and in turn, help to illuminate the definition of a teacher leader. There are a variety of terms that can be used to describe a type of leadership that does not focus on a single person, but rather a distribution of power across the organization. Terms such as (a) shared leadership (b) distributed leadership (c) dispersed leadership (d) collective leadership (e) parallel leadership (f) democratic leadership (Frost & Durrant, 2010; Lindahl 2008) move away from the traditional, hierarchical theory of leadership. These theories acknowledge that schools are dynamic places and that while administrators can enable change, they are not the only direct source of change. For the purpose of this chapter the three concepts of shared leadership, distributive leadership and democratic leadership will be briefly described and differentiated.

**Shared Leadership**

While shared and distributive leadership are often used interchangeably, their meanings are not completely synonymous (Çetin & Keser, 2015). Shared leadership is a shift in focus from one individual leading to a collective effort at leading an organization, including co-leaders, small groups of positional leaders such as an administrative council, to larger groups of non-positional leaders (Lindahl, 2008). In some cases, shared leadership can happen within a team where different members lead depending on the need and the task at hand (Carson, Tesluk & Marrone, 2007).

The concept of shared leadership rests on specific principles such as providing opportunities to lead at every level in an organization and allowing the followers and the leader(s) to influence each other mutually through the creation of common interests and goals. In shared leadership, leadership is a process that is developed through the interactions between the leader(s) and their followers and not everyone has to be involved in the process at a formal level (Çetin & Keser, 2015). This collaborative theory of leadership rests on the premise that the leader(s) should rely on their followers to shape and define the goals, visions and direction of the organization (roles traditional ascribed to a single leader in an organization). While shared leadership is highly collaborative, Carson et al (2007) warned that it should not be confused with complete equality between members; in shared leadership everyone has the opportunity to lead, but they do not often do so at the same time or to the same extent.

**Distributive Leadership**

Like shared leadership, distributive leadership emerged as a reaction to the heroic leadership theories that dominated the discourse (Gronn, 2000). Gibb (1968), a social psychologist, developed the concept of distributive leadership, even coining the term. He, along with other scholars, began questioning the idea that there was always a distinct division between the leader and his/her followers, acknowledging that, "active followers often initiated acts of leading" (Gibb, 1968a, p.252 as quoted in Gronn, 2008). These initial ideas have developed into an entire body of literature devoted to the concept of distributing leadership among members of an organization. Using activity theory as a framework for understanding distributive leadership, Gronn (2000) depicted a leadership style that divides up the labor of leading in which each person's assigned task helps the overall leadership of the entire entity. This supports Çetin & Keser's (2015) summation of distributive leadership theory: "the essential point of distributive

leadership is the fact that more than one individual takes responsibility at the point of leadership. The leadership responsibilities are divided between different individuals" (p. 1028). In distributive leadership, the act of leading is dispersed among a variety of people within the organization, all in an effort to achieve goals that are relevant to their individual situations and that help achieve the larger goals of the organization.

Like shared leadership, distributive leadership should not be confused with democratic leadership. Gronn (2008) explained that when distributive leadership is contrasted with democratic leadership, there is an important difference that distinguishes the two concepts. In a distributive form of leadership, members of the organization are given more opportunity to exercise their voice compared to organizations that abide by a strict hierarchical leadership structure. Voicing opinions and ideas is considered a critical component of any democratically run organization. Yet, as members are encouraged and invited to share in the leadership of their organization, it is always under the supervision and approval of the positional leader of the organization. For example, researchers Maxcy and Nguyen (2006, p. 87 as cited in Gronn 2008) demonstrated that in two schools, "distributive leadership was 'tethered' or confined to domains legitimated by the managers of the schools and the district" (Gronn, 2008, p. 154-155). The fact that leaders outside of the principal were really only able to lead with the consent of the administration contrasts sharply with the theory of democratic leadership, in which the power rests in the hands of everyone within the organization.

**Democratic Leadership**

Among those who maintain they are operating within distributive leadership, there is a tendency to self-describe their style of leadership as democratic. Certainly, shared and distributive leadership have democratic qualities that should not be underplayed, and in fact these

approaches to leadership are growing more popular in school systems around the world because of the perceived shift in the largely autocratic business of leading schools (Gronn, 2008). However, just as shared leadership and distributive leadership have slight distinctions that set them apart from each other, democratic leadership is also a unique approach not totally identical to these other forms of leadership. Distributive and shared leadership are ways of spreading out leadership and tapping into more creative solutions to problems that cannot simply be solved by one person. Although the formal structure of leadership does not change, leadership is shared, in some manner, among teachers and staff that hold formal leadership positions. In a distributive or shared form of leadership the parameters of participation in the leadership are predetermined and can be negotiated, but this must be done with permission from the positional leader of the organization (Woods, 2004).

The confusion over what distinguishes dispersed leadership frameworks and democratic leadership is expressed by Woods (2004), "In this sort of perspective [distributive and shared leadership], democratic leadership functions as a means of engendering compliance with dominant goals and values and harnessing staff commitment, ideas, expertise and experience to realizing these" (p.4). In other words, in distributive and shared leadership, the purpose of using democratic processes is to move forward an idea or goal that was created by those in power. In a truly democratically led environment, the people being led are respected for their creative autonomy and encouraged to question the dominant paradigm. Woods (2005) asserted that distributive leadership is a method of leading, whereas democratic leadership is a philosophy of leading that reemphasizes human capacity to make rational and ethical decisions. Democratic leadership includes the belief that all of humanity is capable and even compelled to participate in democratic practices. In the case of schools, for example, this would include encouraging and

integrating the views of teachers, parents and students by virtue of their being humans within the bounds of the collective endeavor to operate a just and fair school. Woods (2004) identified two ways that democratic leadership can be exercised: (a) democracy-creating in which a leader or leaders work to create an environment in which democracy and democratic processes are encouraged, and (b) democracy-doing which includes making decisions throughout the organization that is initiated by the members of the organization directly or through representatives. Essentially, in a democratically run organization, knowledge (including leadership) is not owned or controlled by any individual person within the organization. The only way to truly gain knowledge, or respond to difficult dilemmas, is to work collaboratively with everyone in order to generate creative solutions and take action (Woods, 2005).

**Teacher Leadership Within Dispersed Leadership Theories**

Teacher leadership is implicitly understood as integral to all of these theories of dispersed leadership. In each of these bodies of literature, the concept of teacher leadership is pivotal to achieving the goals of distributing, sharing, and/or democratizing leadership within schools. All of these theories need teachers to be functional within schools. In answering the questions about with whom or for whom the principal and other administrators will share, distribute or democratize their leadership, the answer is clearly, teachers (Frost & Durrant, 2010; Lindahl, 2008; Gronn, 2008; Woods, 2005). While there are subtle differences between distributive, shared, and democratic leadership, much of the literature on teacher leadership applies the same basic principles to all of these theories (Lindahl, 2008). All three of these theories include the idea that (a) leadership is developed through the interaction between individuals and with the help of a network of people, (b) the rules of who should be considered a leader are flexible, and (c) experts can be found across many people within an organization, rather than a few holding

the expertise or knowledge necessary to achieve success (Bolden, 2011). These frameworks for leadership may not be exactly the same but they all reject the idea of the heroic leader whose personal characteristics and enthusiasm provide the momentum in the organization to move forward. None of these theories are advocating for everyone in the organization to compete for leadership at all times, in a chaotic mess, but rather focus on sharing leadership across the members of the organization (Bolden, 2011; Harris, 2005).

For the purposes of this chapter, distributive and shared leadership are used interchangeably. Distributive and shared leadership stand for a principle in which the traditional hierarchy of school leadership is shifted to include more concepts of whom can lead within the school. It represents a more collaborative approach to leading that includes a strong foundation in shared purpose and shared responsibility for achieving the school's goals. Both shared and distributive leadership theories are used in teacher leadership literature and very little difference is acknowledged between the two theories within the context of teacher leadership (Lindahl, 2008). Although democratic leadership is sometimes conflated with these two theories, in this review of literature introducing this study, democratic leadership will be distinguished, because of its potential for illuminating an emerging theory of teacher leadership, which fits much more closely with democratic leadership than with shared or distributive leadership. This will be outlined and discussed in the conclusion of the chapter. Harris (2005) explained the significance of these leadership theories to the idea of teacher leadership by writing,

> In short, current efforts to redefine leadership *are rooted in notions of distribution* and in the acknowledgement that leadership permeates organizations rather than residing in particular roles or responsibilities. The concept of teacher leadership therefore closely

> aligns with contemporary discussions about 'distributed leadership' insofar that it is neither predominantly position nor authority based. (p. 202)

Within these leadership models, teacher leadership is a natural outgrowth and a welcomed practice.

## Defining Teacher Leadership

### The Leader in Teacher Leadership

Within the concept of teacher leadership one of the most debated topics is the meaning of leadership. What exactly is a leader? What differentiates a leader from a follower? If there are positional leaders, such as principals, what types of leadership can the followers, especially teachers, exercise? It is necessary to define leadership, and more specially teacher leadership in order to further investigate the role of teacher leaders and their impact on schools. As demonstrated by the tremendous body of literature devoted to the topic of educational leadership (not to mention the literature on leadership outside of the field of Education), it is fair to say that a singular definition of leader or leadership is nearly impossible. Most descriptions of leaders include a focus on visions, values and taking action on those ideals. Frost and Durrant (2003) described the vision as a leader's beliefs in what the organization should aim for in the future. This vision is informed by the values that the leader is using to construct the vision. Finally, the leader must have a strategy for achieving their vision. Murphy (2005) echoed Frost and Durrant (2003) in writing, "leadership has historically been defined across two axes, one representing a sense of vision about where the organization should be headed and a second capturing the relational work required to move organizational participants toward that end" (p. 15). In essence, the leader must have clear goals, which are underpinned by strong values, and they must know how to take appropriate action to achieve those goals.

In the context of dispersed leadership patterns, the role of the leader remains the same, but the vision and values are co-created and the strategy used to implement plans is spread throughout the organization. The leader is not solely responsible for creating the vision or deciding on the values for the organization. Harris (2005) theorized that new forms of leadership theory illustrate the idea that leadership is not a certain positional leader, but rather, leadership is a behavior that "facilitates collective action towards a common goal" (p. 202). Spillane, Camburn, and Stitziel-Pareja (2007) offered an even simpler definition of leadership in their examination of distributive leadership used by principals in an urban school district. Spillane et al. decided to designate the leader as the person who, "had responsibility (either alone or with someone else) for the performance or execution of the activity" (p. 105). In an effort to distinguish between leaders and followers in any given situation throughout the school day, a simple and straightforward definition served best. Using Spillane et al.'s definition, many more people are considered leaders, other than administrators. According to this study, leaders include any person(s) moving forward the vision and values of the organization at any given moment.

**Varying Definitions of Teacher Leadership**

Definitions of teacher leadership range from multiple page-long descriptions to a simple six-word sentence and endless variations in-between. The difficulty of defining teacher leadership is mentioned frequently in the teacher leadership literature. In their foundational literature review of teacher leadership, York-Barr and Duke (2004) wrote that authors exalt the benefits and virtues of teacher leadership but many of these authors' conceptualizations of the term varies. York-Barr and Duke theorized that this is likely due to the fact that teacher leadership is a term that is applied to a variety of roles and jobs that a teacher might perform over the course of their career. These varying definitions should not be construed as confusion but

rather as offering a collection of theories on the concept that offer an array of possibilities in understanding teacher leadership.

Wasley (1991), one of the first scholars to write comprehensively about the concept of teacher leadership, also acknowledged that it is difficult to define. In Murphy's (2005) introduction of his book, he offered varied definitions of teacher leadership. In fact, he quoted eleven authors who admit to the ambiguity of the term (p. 12). Harris (2005), pointed out that this lack of clarity has led teacher leadership to serve as an, "umbrella phrase, often meaning different things in different settings" (p. 204). Having a clear definition could possibly improve the development of the concept for both practitioners and researchers (Murphy, 2005); however, the definition of leadership (both in and out of education) is also widely debated (York-Barr & Duke, 2004). More recently, Wenner and Campbell's (2017) literature review of the scholarship since York-Barr and Duke's foundational text, described the same complications in defining teacher leadership and warned about the possible downsides of keeping the term ambiguous,

> Perhaps it is this 'muddiness' that makes teacher leadership so intriguing to many educational stakeholders; teacher leaders can potentially fit into a variety of positions and meet the needs of any situation. Yet, this perspective becomes dangerous when the call and backing for more teacher leaders in schools is not well supported by rigorous, empirical research. (p. 1)

While it is clear that a more agreed upon definition of teacher leadership might allow the research to move forward more cohesively, there has been an enormous body of literature devoted to leadership theory and competing definitions of leaders which has proven effective for researchers and practitioners, it follows that the same could be true for the varying definitions of teacher leadership.

In 2011, the Teacher Leadership Exploratory Consortium (TLEC), a group including union representatives, teachers, school administrators, policy organizations and leaders in higher education in the United States, published the "Teacher Leader Model Standards." They envisioned that this document would provide guiding principles for the institutionalization of teacher leadership and that it would encourage the development of teacher leadership throughout schools in America. They did not offer a definition of teacher leadership, opting instead to define seven domains that teacher leaders must be capable of operating in, in order to be an effective teacher leader. These domains focused strongly on a trained teacher leader, who brings together their school community through cooperation with stakeholders, in order to improve student learning. Using the TLEC framework, a teacher leader is someone who is able to (a) foster a collaborative culture with colleagues, (b) successfully access and use academic research to improve teaching and learning, (c) encourage and stimulate professional learning for continuous improvement, (d) deeply understands the components of teaching and learning and collaborates with colleagues to continuously push themselves and others to improve, (e) promotes and uses data for school and district improvement, (f) advances outreach and communication with families and the wider community, and (g) advocates for the wider profession of teaching and for better student learning by understanding educational policy at the local, state and national level. The document explaining this model of teacher leadership is sixty pages long and is intended for practitioners and schools to use as a guide to developing teacher leaders (TLEC, 2011). However, there are many scholars who advance a clearer and more simplified definition for teacher leadership.

The following are descriptions that provide a wide sampling and overview of differing definitions within the teacher leadership literature of the term "teacher leader". In 1991, Wasley

offered one of the early definitions explaining that teacher leaders have, "the ability to encourage colleagues to change, to do things they wouldn't ordinarily consider without the influence of the leader" (as quoted in Muji and Harris, 2003 p. 438). Blengen & Kennedy (2000) defined the concept as choices that teachers make that help them to become true leaders, "choosing to learn how to talk, to act, and to change is teacher leadership. Learning from disagreement and discussion is also teacher leadership" (p. 3-4). Patterson and Patterson (2004), defined the term with a focus on collaboration with colleagues, "we define a teacher leader as a teacher who works with colleagues for the purpose of improving teaching and learning, whether in a formal or informal capacity" (p. 74). In their study of teacher leaders, Muji and Harris (2006) agreed with Patterson and Patterson's (2004) definition by emphasizing that teacher leadership could occur both formally or informally. After reviewing hundreds of articles and books on teacher leadership, York-Barr and Duke (2004) settled on this definition of teacher leadership:

> We suggest that teacher leadership is the process by which teachers, individually or collectively, influence their colleagues, principals, and other members of the school communities to improve teaching and learning practices with the aim of increased learning and achievement. (p.24).

All of these definitions include a strong emphasis on collaboration and communication with colleagues and the school community. There is a solid belief that teacher leaders are those teachers who are able to bring their school community together and to work collectively in order to improve teaching and learning.

Other scholars have added new dimensions to the concept, since York-Barr and Duke's (2004) review, by including the idea that teacher leaders should engage in work, not only outside

of their classrooms and in their own schools, but also to use their knowledge and leadership to lead in their larger communities and even the world. Katzenmeyer & Moller (2009) stated that,

> Our definition is teacher leaders lead within and beyond the classroom; identify with and contribute to a community of teacher learners and leaders; influence others toward improved educational practice; and accept responsibility for achieving the outcomes of their leadership. (p. 6)

Crowther et al.'s (2009), writing in the same year, echoed similar themes of teacher leaders acting within a much larger scope than simply their own school.

> Teacher leadership is essentially an ethical stance that is based on views of both a better world and the power of teachers to shape meaning systems. It manifests in new forms of understanding and practice that contributes to school success and to the quality of life of the community in the long term (p.10).

Crowther et al.'s (2009) use of the term "ethical stance" hints at a leader who is grounded in a moral purpose that extends beyond management. This idea parallels the concept of the scholar-practitioner leader, described by Bailey (2014) as a particular form of educational leadership in which the leader (who is often a teacher) considers the moral implications of their actions and sees themselves as value-driven actors within a certain socio-historical context.

Crowther et al. (2009) maintained that although there are many definitions of teacher leadership, there is now a bank of definitions that essentially point to the same core ideas. This is supported by Murphy (2005) who observed that all of the definitions of teacher leadership include three key characteristics including (a) creating a community of practice and collaboration with colleagues, (b) achieving change within and outside of the classroom, and (c) attaining goals and enhancing student learning. Murphy pointed out that interestingly none of the

definitions of teacher leadership include references to activities typically associated with management or administrative duties. York-Barr and Duke (2004) also pointed out that the definition of teacher leader has changed over time as the role of teachers in leadership positions has also changed. For example, the first teacher leaders were considered quasi-administrators, such as department chairs who continue to teach in some capacity, but who also have a supervisory role over other teachers. Later, the definition of teacher leader expanded to focus on the instructional expertise of teachers and included the creation of leadership responsibilities such as curriculum developers and mentorship roles.

Among other authors, Katzenmeyer & Moller (2009) and Crowther et al.'s (2009) definitions are a part of a new framework for teacher leadership in which the teacher is someone who continues to teach in the classroom, but also has a profound impact on the culture of their school and the profession of teaching, without necessarily taking on managerial roles (York-Barr and Duke, 2004). In a recent literature review of teacher leadership, Wenner and Campbell (2017) formulated an inclusive definition of teacher leadership when deciding which articles and books they would consider in their analysis of teacher leadership literature, "for the purposes of this review, we defined teacher leaders as *teachers who maintain K-12 classroom-based teaching responsibilities, while also taking on leadership responsibilities outside of the classroom*" (Emphasis in original, p.5). Their rationale for choosing this definition was to make sure that it included the idea that all teachers could potentially choose to lead, "but it does not assume that all teachers do lead outside of their classroom or that they should" (Wenner & Campbell, 2017).

In an effort to reframe scholars' understanding of teacher leadership and to move away from the idea that teacher leaders must be clearly defined by the type of actions they take, some scholars have begun to offer a theory of teacher leadership as a stance rather than specific jobs or

skills that teachers perform. Smulyan's (2016) research on a teacher leadership program that she helped to create in Philadelphia and other cities in the Northeast, demonstrated that in the first year of the summer institute teachers had a traditionally hierarchical view of leadership. This made it difficult for them to associate their own actions with the term "leader." However, by the second summer, teacher participants were highly influenced by Marilyn Cochran-Smith and Susan Lytle's (2009) work on inquiry as a stance rather than a technical skill or strategy. Smulyan, along with the teachers in her teacher leadership institute conceptualized teacher leadership as a worldview that included the following perspectives,

- Teaching is a profession, which means it is growth oriented, intellectual, and process oriented.
- Teaching is a political act in the battle for social justice and democracy.
- Teaching is a collaborative process that includes networking within and across schools and districts with the goal of building relationships, understanding, political power, and knowledge that will ultimately improve the education of all children. (p.20)

This way of defining teacher leadership as a stance rather than a set of skills incorporates many of the same ideas offered by other scholars including a focus on professional growth, social justice and expanding teachers' work outside of their classrooms. Viewing teacher leadership as a stance does not really change the basic concepts that underpin extant research in teacher leadership, however it does have implications for differentiating formal and informal teacher leaders (Poekert, Alexandrou, & Shannon, 2016), which will be explored later in this chapter.

Perhaps the simplest characterization of teacher leadership, which encompasses all of these explanations, is offered by Barth (2001) who shared his preferred definition by writing, "One definition of leadership I like very much is: 'Making happen what you believe in.'

Teachers believe strongly in many things, and those who dare to follow those beliefs and make them happen choose one of many paths available to them" (p. 446). As Phelps (2008) pointed out sometimes the simplest is the best. This definition of teacher leadership removes the need for a teacher to seek a job as a positional leader, allowing the definition to incorporate both positional and non-positional roles. Also, this explanation of leadership aligns closely with the democratic leadership perspective in which, the visions and goals do not originate from a positional leader, in order for a teacher to carry out that goal (Wood, 2004); "making happen what you believe in" (Barth, 2001) allows room for the teacher to develop their own vision and goals to improve their work and school (Phelps, 2008). Murphy (2005) contended that most definitions of teacher leadership do not include the idea that the teacher leaders, themselves, create the vision for their schools. He expressed concern that unlike the literature on other forms of educational leadership, "the role of the teacher leader in defining that vision is muted" (p. 15). Frost (2012), agreed with these working definitions by proposing that all teachers can lead and leadership does not have to be linked to the traditional hierarchy of the school. In this way, Barth's (2001) simple definition offered a more malleable and flexible characterization that can stretch to fit most existing definitions and incorporate newer concepts of teacher leaders in non-positional roles.

**Enacting Teacher Leadership**

The definitions of teacher leadership in the previous section hint at the variety of ways that teacher leaders enact their leadership. In fact, describing how teacher leaders lead helps to round out the definitions into more robust descriptions of the concept. Within the literature, the descriptions of teacher leaders' actions, ranges from theoretical frameworks of how teacher leaders accomplish their goals, to practical lists of actions that teacher leaders can take, or jobs

they can fulfill. York-Barr and Duke's (2004) highlighted that teacher leadership is practiced in a variety of ways that include formal and informal roles. The formal positions might include being a union representative, leading a curriculum team, mentoring new teachers, instructional coaching in content areas such as literacy or math, chairing a department, or facilitate learning in professional groups (Muji and Harris, 2003; York-Barr and Duke, 2004, Nappi, 2014). Some of these formal roles relegate teachers to administrative assistants, as Lindahl (2008) pointed out, "designing school climate surveys and analyzing their results for accreditation processes or collaboratively setting secondary school schedules are not productive and satisfying uses of teachers' time" (p. 300). Not all positional leadership roles are as Lindahl described, but it is fair to say that the term teacher leader is sometimes applied to jobs that lack substance. Scholars emphasize the need for providing teachers with meaningful jobs that can make a real impact on school-wide goals.

Fairman and Mackenzie (2012) proposed that teacher leaders (both positional and non-positional) take actions that go beyond surveys and accreditation committees. They refer to these actions as "spheres of teacher leadership action for learning" (p. 232). Fairman and Mackenzie created their model with the help of York-Barr and Duke's (2004) comprehensive literature review of teacher leadership and added more findings from their own research and case studies, as well as taking into consideration the expanded literature that was produced after York-Barr and Duke's publication. Under their spheres of teacher leadership action, teachers (a) extend and deepen their professional knowledge and skills to improve their classroom instruction, (b) experiment and innovate on their beliefs and practices in the classroom, (c) share their values and pedagogical views with their school community, (d) collaborate with other teachers to implement new ideas and reflect on this work with their colleagues to build new

knowledge, (d) use their personal connections and relationships to influence positive changes in norms and behaviors within the larger school and community, (e) question, publicly the norms and existing practices within their school, to advocate for change, (f) participate actively in school-wide reform efforts, (g) collaborate and communicate with parents and students to widen the community involvement in school improvement efforts, and (h) share and present their own work with other teacher, outside of their own schools to advance improvements in the teaching profession (p. 232). It is important to note that Fairman & Mackenzie did not claim that teachers operate in all of these spheres at one time. In fact, they pointed out that teacher leaders may work in several spheres at once and/or they may move in and out of these spheres over the course of their entire career. For Fairman & Mackenzie, it is clear that teacher leadership is not a simple list of jobs or activities that teachers engage in, but rather it is a complex network of ways that teachers interact with members of their community.

The nine spheres of teacher action that Fairman and Mackenzie (2012) outlined incorporate a huge number of activities and actions; however, it is missing a key component that Crowther et al. (2009) included in their framework of how teacher leaders operate in their schools and communities. While Fairman and Mackenzie vaguely defined the role of the teacher leader as someone who advocates for positive changes within their schools, Crowther et al. more specifically mentioned the role of the teacher leader as someone who actively fights for oppressed or marginalized groups. For example, they wrote that teacher leaders, "work with administrators to find solutions to issues of equity, fairness, and justice" and "stand up for children, especially disadvantaged and marginalized individuals and groups" (Crowther et al., 2009, p. 3). Arguably, these could fit under the category of school-wide reform efforts or sharing values with the school community, both mentioned in Fairman and Mackenzie; however,

Crowther et al. emphasized more clearly the need for teacher leaders to act as change agents who promote issues of social justice and help to find solutions to those issues. Smulyan (2016) made a similar claim that teacher leaders are political actors who believe that, "teaching is a political act in the battle for social justice and democracy" (p.9). Fitzgerald and Gunter (2006), claimed that the informal teacher leaders they studied were focused on working for the children in their care and that they had a "wider social justice imperative." Returning to Barth's (2001) definition of leadership, "making happen what you believe in," the teacher leader's job is varied and encompasses an incredible amount of opportunities to influence schools in a positive and powerful way.

## Helping and Hindering Teacher Leadership

Teacher leadership can be encouraged or hindered by positional leaders and the larger school community and structure. Even as scholars exalt the potential for all teachers to lead (Barth, 2001; Phelps, 2008; Frost, 2012) few teachers choose to lead outside of their classrooms (Barth, 2001). Crowther et al. (2009) acknowledged that all teachers may have the potential to lead, but not all teachers want to lead. While this is undoubtedly true, there are cases in which teachers are discouraged or deterred from leading because of obstacles, taking away their ability to choose to lead or pursue other professional interests. In this section, the conditions for encouraging teacher leadership will be explored and the obstacles to teacher leadership will be outlined, with a particular focus on the role of principal.

### The Role of Principal in Teacher Leadership

The role of the principal is central to teacher leadership theory. Smylie et al. (2002) wrote poignantly, "it is a paradox of teacher leadership that it requires administrative leadership to be effective" (as quoted in Murphy, 2005, p. 136). The reasons for this administrative support

is clear from both the principal and the teacher's perspective; principals are overburdened with work and need help leading; they are also the person with the most power to potentially hinder or help the expansion of teacher leadership within their schools. Pearce (2004) wrote about the advantages of combining vertical and shared leadership within an organization that is involved in "knowledge work." He pointed out that it is impossible for the vertical leader, such as the principal, to have all of the skills and abilities needed to run such a complex organization (p. 47). The demands that a school makes on the single vertical leader are virtually impossible to meet without distributing and sharing leadership among the faculty (Barth, 2001; Beachum & Dentith, 2004; Nappi, 2014). It is within the principal's power to move ideas forward or to ignore initiatives in favor of others (Bangs & Frost, 2015). This is clearly true in the case of teacher leadership where, "principals occupy the critical space in the teacher leadership equation and center stage in the work redesign required to bring distributive leadership to life in schools" (Murphy, Smylie, Mayrowetz & Louis, 2009, p. 181)

In some authors' opinions, principals themselves may present the greatest obstacle to development of teacher leaders in their schools. Encouraging teacher leadership can be a test of a principal's confidence in his or her own abilities. They must be willing to relinquish some of their own power to share leadership with teachers (Blengen & Kennedy, 2000, Murphy, 2005). The school administration must be able to trust teachers with real decisions and share their leadership, in order to empower others to take on leadership roles (Frost, 2012). This work of facilitating and laying the groundwork for teacher leadership may be challenging. A study by Leithwood, Mascall, Strauss, Sacks, Memon, & Yashkina (2007) showed that distributive leadership was difficult for principals to maintain, especially in initiatives that were not considered "high priority." Nurturing teacher leadership requires intentional work from the

principal and district leaders to cultivate opportunities and structures, and it is clear that principals are essential to setting the direction of any work that is distributed among other leaders in the school (Leithwood et al., 2007). The vertical leader sets the stage and can create favorable conditions for teacher leaders to flourish.

Barth (2001) stated that principals who encourage teacher leadership actually leverage their own ability to lead. A principal's primary goal is to ensure students learn and flourish. Logically, the more principals encourage teacher leaders to innovate and improve their teaching, the better students will be able to learn and access their full potential (Birky, Shelton & Headley, 2006). Crowther et al. (2009) suggested that the concept of teacher leadership evolves the role of principal. These new roles include incorporating the ideas of others, making space for individual innovations, trusting in the concept of teacher leadership and praising successful examples of teacher leadership (p.93). Birky et al.'s (2006) study of two groups of teacher leaders showed that according to teachers, "principals played an absolutely essential role for reform to happen in their building" (p. 95) by encouraging and supporting teachers who took risks and being open to sharing leadership with motivated teachers. This same study concluded by recommending that administrative preparation programs provide, "relevant instruction and meaningful practicum experience" (p. 97) in distributive leadership practices, in order to encourage administrators to broaden their views of leadership patterns.

**Impediments to Teacher Leadership**

In addition to the principal, there are other possible impediments to establishing and sustaining teacher leadership. Teachers need time and training to hone their leadership skills, collaborate with their colleagues, develop their values, and create innovative plans (Barth, 2001; Muji and Harris, 2003). In many cases, fellow teachers actively resist and discourage leadership

among their ranks (Blegen and Kennedy, 2000). Teachers who take on more leadership responsibilities "go against the grain" and can find themselves at odds with their peers and their professional unions (Harris, 2005; Barth, 2001). Barth (2001) explained, "some unions don't look kindly on teachers who take on additional leadership functions without pay" (p. 445). In fact, several studies showed that teachers who took on more leadership roles felt a loss of connection with their peers and a feeling of isolation (Muji and Harris, 2003). Teaching, as a unionized profession, tends towards an egalitarian perspective in which all teachers are created equal and are on a level playing field (Barth, 2001; Muji and Harris, 2003; Phelps, 2008). This equality creates a tendency for teachers to view teacher leaders as stepping out of their proper place among their peers. While teacher unions have recently recognized the importance of teacher leadership, with strong representation in the Teacher Leadership Exploratory Consortium (2012), it is the principal that has the power to create safer paths for teacher leaders by encouraging a collaborative culture in their schools. Muji and Harris (2003) found that it is easier for teacher leaders to exercise their leadership without feeling that they are in opposition to their peer group, when the school culture already embraces collaboration among peers.

Finally, Crowther et al. (2009) noted that teachers themselves can hinder their own development. Some teachers lack the confidence to lead and need support taking a lead role where they would be most comfortable. Others display what Crowther et al. (2009) termed the "I'm just a teacher" mindset or "I just want to teach" mindset (p. 44). Many of these mindsets are a direct result of teachers having an unclear understanding of the concept of teacher leadership or because they work in systems in which only principals can be considered leaders. Katzenmeyer and Moller (2001) noted this lack of understanding by stating that, "supporting teacher leadership means understanding the concept, awakening the understanding of teachers

themselves to their leadership potential, and then providing for the development of teacher leadership" (as quoted in Murphy, 2005, p.105). These considerations raise the question, what can district school administrators do to develop teacher leadership among their teachers?

**Fostering Teacher Leadership**

There is ample evidence that certain conditions and behaviors in schools encourage the growth of teacher leaders. In Beachum and Dentith's (2004) ethnographic study of 25 teacher leaders, they were able to identify some of the conditions that create an environment in which teachers feel more compelled and comfortable to lead in their schools. The results of their findings led Beachum and Dentith to recommend several actions that schools can take to foster teacher leadership including (a) administrators should recognize and value the contributions of teachers in the daily business of running the school, (b) administrators should involve teachers in decisions-making processes and provide the time and resources necessary to support teachers in those roles, (c) administrators must develop strong and trusting relationships with their teachers, allowing them to take risks with support from their supervisors, (d) teachers should take a more proactive role in the daily work of running the school, be willing to take risks and speak up with authority when they have opinions to share, and (e) post-graduate schools should include teacher leadership in their graduate programs.

Frost (2012), proposed list of ways that teacher leadership can be encouraged, especially when growth in non-positional leadership is included in the goal for the school. He encouraged a partnership with outside organizations, such as universities to help support the growth and training in leadership skills for teachers. He, along with Crowther (2009) and Murphy (2005), all emphasized a need for teachers to be a part of a network, outside of their own schools to invigorate and inspire their leadership. Frost emphasized that administrator's need to act as

facilitators and guide teachers in personal leadership journeys. For example, he recommended that administrators and outside organizations "facilitate access to relevant literature" (p. 211) and provide "guidance on leadership strategies" (p.211). The language that Frost chose is intentional; he wanted to offer a more democratic model of leadership sharing in which those in vertical leadership positions step back and guide teachers to find their voice, rather than assigning them tasks and titles, thereby breaking down the institutional obstacles that prevent teachers from taking leadership roles. Schools, as institutions, are designed to support hierarchical systems of leadership. The bureaucracy of schools is built on the premise that only a few people are charged with making decisions. Principals must actively fight against the very structure that promotes their power and leadership in order to allow space for teachers to lead (Wasley, 1991; Katzenmeyer & Moller, 2001; Murphy, 2005).

Many scholars propose that pre-service and graduate education school programs should teach the concepts and theories that are associated with teacher leadership (Murphy, 2005; Crowther, 2009). In order to combat some of the preconceptions that lead teachers to doubt their abilities, pre-service teachers should be exposed to the concept of teacher leadership before officially entering into their careers, in order to train their mindset as being capable and worthy of leadership (Suranna & Moss, 1999). In Suranna and Moss' (1999) study of pre-service teachers, half of those interviewed thought they had the potential to be teacher leaders, while the other half subscribed to a much stricter hierarchy of leadership, which did not include teacher leaders. The researchers concluded that the interviews "highlighted the need for further understanding of and inquiry into the benefits of collaborative decision-making in school" (p. 15). Many of the pre-service teachers had no exposure to shared or distributive leadership frameworks and, therefore, had a limited perspective on their ability to lead as teachers.

In a personal narrative of one small college's attempt to teach the values of teacher leadership in a pre-service education program, Snyder (2015) wrote that the results were mixed for graduates. Most graduates felt that teaching in the first few years was so overwhelming that it was difficult to take initiative and advocate for their larger beliefs. However, it seems that most of the students who struggled to exercise leadership were in schools where the bureaucracy and hierarchy had little room for teacher leadership. While it is likely that novice teachers are more limited in their leadership potential, by simple virtue of being overwhelmed by the daily grind of learning how to teach, pre-service level teachers can begin learning the concepts and skills associated with teacher leadership, especially at a time when they are asked to reflect on their beliefs and values (Suranna & Moss, 1999; Phelps, 2008; Bond, 2011; Snyder, 2015; Huang, 2016). Bond (2011), recommended establishing a "mental framework" (p. 295) of teacher leadership in pre-service educational programs, allowing a teacher's journey as a leader to start sooner with the very idea that it is possible for a teacher to lead, without leaving the profession. Ideally, as teachers begin working in their own schools, the education around teacher leadership will continue throughout their professional careers, through the support of their peers and principals.

## Informal Teacher Leadership

The concepts of non-positional or informal teacher leadership were introduced earlier in this chapter within the context of the larger body of literature on teacher leadership. Many times, informal and formal teacher leaders are not delineated in the literature as different groups. In one case, Poekert, Alexandrou, and Shannon (2016) proposed that differentiating between the two forms of teacher leadership is not helpful to scholars studying the subject:

> In fact, we would suggest that recent conversations in the literature over the distinctions between formal and informal leadership are unproductive. What truly matters is the value

> of an individual's leadership as perceived by other members of their community. Whether or not the teachers are formal or informal leaders within their schools, what is most essential is that they take a leadership stance that is responsive to the needs of their students and motivates their colleagues toward improving their performance. (p. 325)

Teachers who adopt a leadership stance, whether in informal or formal leadership roles, may both be working towards a common goal of improving student learning and helping colleagues improve their teaching practice, but the ways in which they achieve those goals could be different and worth examining separately. It seems naïve to think that teacher leaders who are afforded extra time and/or compensation for their leadership are having the same experience as teachers whose leadership stance is non-positional. There is a growing body of literature that supports the idea of informal leadership as a subset of leadership theory that must be examined in its own right, including in the field of teacher leadership.

**Informal Leadership**

Within the field of organizational leadership, very little attention has been paid to informal leaders. The work that has been done on informal leadership is focused on the power of informal leadership within small groups. Informal leaders, as individuals, are often portrayed as working against the goals of the institution and the formal leaders. Within this context, the portrait of the informal leader has been largely negative (Larsson, Segersteen, & Svensson, 2010; Miner, 2013). However, a few pioneering researchers have chosen to focus on informal leaders within organizations and their work closely aligns with work on informal teacher leaders. In fact, Pielstick's (2000) research on informal leaders included a large number of educators in the study. Pielstick acknowledged that schools were organizations where informal leadership was practiced frequently. This study of informal leadership found that informal leaders often showed

more signs of authentic leading which included six themes: shared vision, communication, relationships, community, guidance and character. Pielstick theorized that informal leaders had to rely on these authentic forms of leadership because they did not have "power-wielding" tactics available to them. Informal leaders needed to gain consensus and form strong relationships with colleagues in order to achieve their goals.

Further research was conducted on informal leadership within a variety of organizations and legitimizing the need to study this type of leader more closely and separate from their formal counterparts. Most of these studies have found that informal leaders must rely on their communication skills, relationships and expertise to influence decision making within an organization. Research by Larsson, Segersteen, & Svensson (2010) on a high-tech firm revealed that informal leaders were able to move more freely through their organizations because they interact in more settings to exchange information. Miner (2013) reported similar findings in that informal leaders were found to have the ability to voice their ideas and work towards their goals in both informal and formal settings compared to their formal leader counterparts. Larsson et al. describe these informal leaders as "information brokers" (p. 2) who are perceived as being highly competent and who use their expertise to speak clearly about goals that seem relevant to the daily operation of their colleagues, rather than traditional leaders who often evoke emotion and present broader ideas and goals for the organization. Both of these types of leadership are important to the organization and in many ways, complement each other. Larsson et al. and Miner found that informal leaders worked with formal leaders and were perceived as helpful and as having a positive influence on the organization, as opposed to the previous findings that informal leaders predominately worked against the formal leaders.

Organizational leadership theory also offers another lens to view informal leaders and their leadership identities. DeRue and Ashford (2010) reported that scholars are now beginning to recognize that leadership is not always associated with titles and formal roles. They offered a theory of leadership identity that is dynamic and that can shift over time and across different contexts. This theory of a dynamic leadership identity includes the ways in which leaders and followers grant each other the rights associated with leading and following. It is a reciprocal agreement that is made at any given moment in the work place for both informal and formal leaders. DeRue and Ashford propose that there are benefits to examining leadership more critically and studying more shared leadership structures, "This article moves the leadership field away from a static and hierarchical conception of leadership and toward a more dynamic, social, and relational conception of the leadership development process" (p. 629). Works by authors such as DeRue and Ashford are part of a larger conversation of how shared and distributive leadership models are constructed and the role of informal leaders within those frameworks. Moreover, such analyses underscore the value in studying the impact informal leaders have on complex organizations.

**Informal Teacher Leadership**

In recent years, scholars of teacher leadership have given increased attention to non-positional teacher leadership. The idea is not entirely new. Whitaker in 1993, was already writing about informal teacher leaders and conducting a study in which principals were shown to be more effective at making decisions when they collaborated with informal teacher leaders. In 1995, Whitaker claimed that non-positional teacher leaders were not studied within the educational field. Interestingly, Collinson made similar claims in 2012, indicating that this subtopic within teacher leadership has not progressed much in over a decade.

While informal teacher leadership is not well researched and studied, there are some scholars who have explored the concept. Barth in 2001 proclaimed,

> All teachers can lead. Indeed, if schools are going to become places in which all children are learning, all teachers *must* lead. Skeptics might amend this assertion to "some teachers," or "a few teachers," or even "many teachers." These low expectations are destructive, limiting, and self-fulfilling as "some children can learn." The fact of the matter is that *all* teachers harbor leadership capabilities waiting to be unlocked and engaged for the good of the school. (Emphasis in original text, p. 444).

Over a decade later, a framework for this form of horizontal leadership is becoming somewhat clearer. In response to positional teacher leadership jobs, in which the teacher leader is recognized in a formal way as the leader of some activity or group, some scholars believe there is a risk in narrowing the concept of teacher leadership. Frost (2012) hesitated at the TLEC's recommendation that teacher leaders "need defined responsibilities, authority, time to collaborate, and support from school administrators to assume leadership roles" (as quoted in Frost, 2012, p. 210). This vision of teacher leadership restricts the concept to a select few that are given the resources and recognition needed to be an official leader. The concept of non-positional leadership broadens significantly the work that teacher leaders can engage in.

Scholars have taken different approaches in studying non-positional leadership. Many times, it is simply included in a work on teacher leadership as one form of leadership. While this is the most common way of discussing informal teacher leadership, some scholars go a step further. For example, Danielson (2006) defines the very nature of teacher leadership as informal:

> The principal characteristic of teacher leadership, as described here, is that it is completely informal. Teacher leaders don't gain their authority through an assigned role

> or position; rather, they earn it through their work with both their students and their colleagues. Teacher leaders play a highly significant role in the work of the school and in school improvement efforts. Precisely because of its informal and voluntary nature, teacher leadership represents the highest level of professionalism. Teacher leaders are not being paid to do their work; they go the extra mile out of a commitment to the students they serve. (p.1)

In this case, Danielson excluded formal teacher leadership from her conception of teacher leader. Later in her book she described formal teacher leaders as extensions of the administration and wrote that these formalized teacher leaders were, "administrators in teachers' clothing" (p. 19).

With calls to fill the gap in the literature on informal teacher leaders (Fitzgerald & Gunter, 2008; Collinson, 2012), scholars such as Carver (2016) have chosen to focus their research on this specific group of teacher leaders. Carver studied the reflections of teachers enrolled in a 2-year leadership academy. The director of the academy specifically took a non-positional stance on teacher leadership, "It is common to hear Academy alumni define teacher leadership as the art of "leading from where you stand," a non-positional perspective that reflects the views of the program director who believes that teacher leadership is about exerting influence based on credibility and trustworthiness, not power or authority" (p. 164). While the academy was not explicitly teaching only informal teacher leadership, at its core, teachers were made to understand that leadership was more of a state of mind rather than a title. In fact, Carver (2016) found that participants were empowered by this conception of teacher leadership:

> Viewed collectively, the above traits support a conceptualization of teacher leadership that is neither positional nor role bound, but can be practiced by any teacher, at any time, and in any place—including the classroom. Study participants reported finding this non-

> positional view of teacher leadership liberating as it allowed them to maintain their identity as a teacher while preparing to be leaders. (p. 169)

With some scholars eschewing the concept of teacher leadership as a particular role or title, a new conception of teacher leadership is emerging—teacher leadership as a stance. Formal teacher leaders are assigned a role that is rooted in a particular job and while they might share some characteristics with informal teacher leaders, informal teacher leaders are more community-based leaders (Murphy, 2007; Lai & Cheung, 2015). Some teacher leaders do not gain their leadership identity from their role and title. These teacher leaders need another way of understanding their own leadership. Smulyan (2016) and Hunzicker (2017) offered the idea of informal teacher leaders as adopting a leadership stance. Hunzicker wrote, "because teacher leadership is a stance, or way of thinking and being, the decision to lead or not to lead ultimately lies within the power of teachers themselves, even when faced with obstacles such as an undesirable school culture, an unsupportive building principal, or resistant colleagues." This idea focuses on the uniquely voluntary nature of informal teacher leadership and the subsequent investment these teachers have when adopting their leadership stance.

Teacher leaders of this type are able to earn credibility precisely because they are doing the same work as their colleagues and volunteering their time. In Fairman and Mackenzie's (2015) study of teachers, which included informal leaders, they wrote:

> Moreover, teachers emphasized that informal leadership had greater potential than formal leadership to influence improvement in teaching and student learning. Aileen, an English teacher and member of her school leadership team at Drummond High School described the team this way: 'Formal leaders are considered leaders because of the

> positions they hold and may or may not be effective. Informal leaders, while they may not hold a defined leadership position, are always effective'. (p. 73)

Donaldson (2007) described some advantages that non-positional teacher leaders possess including:

- Having a clear sense of purpose because they can apply their ideas directly to their own teaching and with their own students.
- They are not charged with evaluating any teachers.
- They earn credibility by doing the same job as the colleagues they are hoping to influence.
- They are often a part of closely-knit groups that are not forced to work together but form naturally. This makes their working groups more productive.
- They are able to model strong teaching while also showing risk-taking and vulnerability.

All of these advantages address the authenticity of their leadership and explain why non-positional leaders can be very successful, especially in influencing their fellow teachers.

Many times, informal teacher leaders are attempting to influence their colleagues. While formal leaders might rely on positional authority, such as an evaluation system to gain compliance from teachers, informal leaders must be more thoughtful and subtle in their approach. Frost and Harris (2003) encouraged teachers to consider where their power comes from when leading without a formal title, "teachers who seek to lead without any formal position are forced to be subtler in their approach; they will need to reflect on and assess their stock of power and authority and plan accordingly" (p. 12). These teacher leaders are able to demonstrate more dynamic relationships with their followers, as DeRue and Ashford (2006) found in their

research, because the informality of their leadership allows the follower to choose if they want to follow their leadership (Fairman & Mackenzie, 2015; Huang, 2016).

Non-positional teacher leaders share many of the same dispositions and accomplishments as their formal counterparts. For example, they understand how to plan for change, communicate their ideas clearly and they have strong interpersonal skills (Frost & Harris, 2003). These similarities in dispositions might explain why many scholars study teacher leaders as a group rather than truly differentiating between different types of teacher leadership. Lai and Cheung (2015) summarized the literature on teacher leadership as it relates to what teacher leaders do and concluded that all teacher leaders help to improve education, participate in teacher learning communities, and can spread their influence beyond their own classrooms. What makes informal leaders unique are not the goals that they try to accomplish; it is the way in which they achieve their goals. Most informal teacher leaders prioritize their teaching over their leading. They are teachers first and foremost (Collinson, 2012; Danielson, 2016). Their leadership emerges from a private space with like-minded colleagues with whom they work collaboratively. From there, they bring ideas to a more general audience. It is in that private space that non-positional leaders are most creative in their problem solving (Huang, 2016). Huang explained that this creativity is spontaneous, authentic and originates from the teacher:

> Teacher leadership, by contrast, is spontaneously exercised by teachers (any teacher) in response to a need or an opportunity through work with colleagues. It emerges organically; no one appoints teacher leaders to their roles. And while administrators may (and usually do) play an important supporting role, the initiative comes from the teacher. (p. 19)

Another approach that scholars have taken in regard to differentiating formal and informal teacher leadership is centered on professionality. If non-positional leadership is accepted as a legitimate form of leadership that has positive benefits, then all teachers can potentially be leaders. To some, this may be considered a radical concept, but it is important to consider the advantages of such an idea. Formal leaders such as principals are more likely to cycle in and out of schools, whereas teachers are much more likely to stay in their school and develop their leadership over an entire career, helping to stabilize school culture (Danielson, 2006; Pucella, 2014). Pucella noted that this stability is essential for long-term change-making. Teachers who initiate and participate in bringing about changes in their schools make it more likely to succeed because of their commitment to and longevity in their school community. As well, this style of leadership is inherently shared and invites many people to engage in decision-making; their leadership includes many within in their schools and communities (Frost & Harris, 2003). This means that when schools focus primarily on building formal leadership positions, they are reducing the possibility of building leadership capacity in all teachers. The alternative approach is to see teacher leadership as a natural extension of teacher professionality or as Bangs & Frost (2015) call it, "extended mode of professionality." This aligns neatly with the concept of teacher leadership as stance rather than a role or job. Smulyan (2016) wrote that the first element of a teacher leadership stance is that the teacher sees her profession as an opportunity to grow. Fairman and Mackenzie (2015) take this idea a step farther by questioning the very term teacher leader, "In other words, is it likely that the responsibilities of leadership need to be understood as part of the expected professional role of the teacher such that we do not need the term 'teacher leader' at all" (p. 81)?

If all teachers have the capacity to lead, it is necessary to consider what type of support and education teachers need to reach their fullest potential. A number of scholars are calling for more education programs to include teacher leadership concepts and that teachers should be offered professional development opportunities throughout their career in order to give them time to process their potential to lead as a teacher. Even teachers who are new to the profession can benefit from understanding their potential leadership capabilities and that the definition of leadership is not confined to those with formal titles. By learning the "language of leadership" they might be empowered to consider their actions as examples of leadership (Pucella, 2014). Huang (2014) recommended that teachers have the opportunity to learn how to take agency across many different school settings and contexts so that they can apply their pre-service education in whatever setting they end up in. In Carver's (2016) study of a teacher leadership program, teachers were hesitant to use the title of leader because of their traditional perspectives of leadership. After finishing their program, teachers left feeling like leadership was an appropriate term to describe their work.

Teachers are often conflicted about taking on a leadership role because teaching, as a profession, puts a strong emphasis on focusing on their primary role in the classroom? Leading as a teacher, may convey a sense of being better than other union members (Wasley, 1991; Barth, 2001; York-Barr & Duke, 2004; Murphy, 2005). Fairman and Mackenzie (2015) wrote that their participants, "cherished their informal roles and their membership in a group, and they actively resisted making these roles more formal" (p. 75). Some even claimed that having their role formalized had the potential of delegitimizing their ability to lead. Multiple studies show that teachers do not perceive themselves as leaders, even when their actions align with accepted definitions of leadership (Hunzicker, 2017). When teachers are given formal leadership

positions, there must be followers who are somehow subordinate (Fitzgerald & Gunter, 2008). This fact stands in contrast to the shared understanding of teaching as a profession that values cooperation and respect between colleagues.

If teacher leadership is grounded in a theory that all teachers have the potential to lead (Barth, 2001, Crowther et al., 2009; Frost, 2012), the narrow view of teacher leaders as ladder climbers who are only looking to hold power over their peers becomes less prevalent. All types of teacher leaders offer something to their schools whether they are department chairs, literacy specialists, new teacher mentors, or curriculum team leaders, however there is much to be gained by taking a more egalitarian approach to some of these roles. For example, designating a teacher as a mentor or specialist is good to serve the purpose of disseminating "officially sanctioned knowledge" (Frost, 2012). However, if one of the purposes of the school is to encourage innovation and to excite teachers in their practice and work around the school, the role of teacher leader must provide opportunities where teachers can work to "co-construct knowledge" (Frost, 2012, p. 219). If schools take an approach to leadership in which the informal and the formal leaders are working together to be a "knowledge creator" and a "knowledge user" (Frost, 2012, p. 218) there is a greater likelihood that longer-term innovation will flourish. Leithwood et al. (2007) described a shared leadership function in which the formal and informal leaders work together to lead a project or initiative and each leader offers their particular expertise, but also encourages all leaders to build further expertise for future endeavors by learning from each other.

While an inclusive conception of teacher leadership seems promising, it is important to note that some scholars are skeptical. Fitzgerald & Gunter (2008) wrote that it is time to question the term teacher leader. They raise doubts that teacher leaders are actually given the power to make autonomous decisions, indicative of true leadership. Put succinctly, "of concern is that this is

simply a modernized way to seduce teachers to take on additional tasks and responsibilities without the commensurate increase in their salary or time allowance. This point is rarely debated in the leadership literature, possibly because to say this is deeply heretical" (Fitzgerald & Gunter, p. 334). There also seem to be an issue with how scholars define leadership and how teachers define those same behaviors. In a study conducted by Hanunscin, Rebello & Sinha (2012), their "results point to a mismatch between how leadership is defined in the literature and how leadership is defined by teachers themselves" (p.16). Thus far, the literature on teacher leadership is laden with examples of managerial work focused on formal or semi-formal roles (Fitzgerald & Gunter).

## The Future of Teacher Leadership Literature

Teacher leadership, as a whole, is still in its nascent stages. More work is needed in collecting data on the impact of teacher leadership in every area including school improvement, student learning, and professional development. Most of the studies that exist are smaller scale, are purely theoretical, or are simply narrative in form (York-Barr and Duke, 2004; Murphy, 2005, Harris, 2005). Murphy (2005) concluded his book on teacher leadership, with several pages devoted to "a skeptical note" (p. 160) and "caveats and concerns" (p. 162). He brought to light a series of issues that require more scholarship and inquiry such as (a) very little accountability issues raised in the literature, (b) not enough of a focus on social justice in the literature, (c) lack of teachers in defining and describing teacher leadership, (d) too strong of an emphasis on managerial and administrative teacher leader positions, and most importantly, (e) stronger evidence on the effects that teacher leadership can have on schools and students (Murphy, 2005, p. 162-164). Since publishing his book in 2005, the body of literature has continued to develop in response to these and other concerns.

These evolving concepts of non-positional teacher leadership seem to be the closest to fitting into a more democratically oriented leadership structure. Barth's (2001) inclusive definition of teacher leaders, Frost's (2012) encouragement for more non-positional leaders, and Leithwood et al.'s descriptions of mutual shared leadership, all point to the idea that the theory of teacher leadership must become more democratic. Wood (2005) sighted evidence that the more democratic an organization is, the more the members of that organization are "committed and willing to give their potential to the organization" (p. 31). In a democratic leadership structure, the formal leaders are expected to make mistakes, making it necessary to create an environment in which informal leaders are prepared to voice concerns, raise questions and take initiative when it is necessary (Wood, 2005). To some, the idea of democratizing leadership in schools is a recipe for disaster, because it may appear as if no one is in charge of the school. However, Dewey stressed in, *Democracy and Education*, that the failure of democracies has always been in places where it was not practiced regularly in everyday life:

> Where democracy has fallen, it was too exclusively political in nature. It had not become part of the bone and blood of the people in daily conduct. Unless democratic habits of thought and action are part of the fiber of a people, political democracy is insecure (As quoted in Wood, 2005, p. 32).

Dewey was speaking about governments, but these thoughts apply to schools and teacher leadership as well. Styles of distributive leadership that use democratic practices to serve limited functions for short periods of time, are not as effective as leaders who truly embrace democratic principles in the daily work of running the school. Existence of non-positional teacher leaders are a positive step in achieving a more democratic style of leadership that does not simply "talk the talk" but that also "walks the walk." Encouraging non-positional leadership, in addition to

positional leadership, allows for a broader spectrum of ideas and people who are participating in the creation and maintenance of a strong school culture (Wood, 2005).

Initial research on the effects of encouraging teachers to lead is positive. Hairon, Wee Pin Goh, and Chua (2015) pointed out that there is a close relationship between the presence of strong Professional Learning Communities (PLCs) and teacher leaders. They concluded their study by stating that there is a direct correlation with effective and productive PLCs and teacher leaders, who are needed to lead the PLCs. Other studies point to similar conclusions: teacher leaders have an impact on their colleagues' teaching practices. Muji and Harris (2003) wrote, "Evidence from the literature suggests that generating teacher leadership, with its combination of increased collaboration and increased responsibility, has positive effects on transforming schools as organizations and on helping to diminish teacher alienation" (p 441). Although the studies on the school-wide effects on colleagues is less clear, positive effects of teacher leaders at the classroom level are more substantiated, especially when practiced in schools where working collaboratively with colleagues was supported (York-Barr and Duke, 2004; Harris, 2005; Crowther, 2009).

There are very few studies that conclusively link student achievement and teacher leadership (Harris, 2005). However, some scholars argue that the link to student performance is in the work that has been done on teacher leaders' positive impact at the classroom level (Barth, 2001; Harris, 2005). Schools with more collaborative cultures have a direct positive impact on their students' success in all areas of learning (Berry et al., 2013). If there is a clear link between teacher leaders fostering strong professional learning communities and student achievement, it is logical that these PLCs will help teachers become more effective in their teaching (Hairon et al., 2015). This indirect link between the teacher leader and the students is similar to studies that

link principal leadership with student learning. The fact that the link is indirect does not mean that the impact is insignificant, but rather difficult to quantify (York-Barr and Duke, 2004).

The clearest and most documented impact that teacher leadership has had is on the teacher leaders themselves. In an interesting study of 57 "promising" new teachers, Cameron and Lovett (2015) interviewed and followed the cohort nine-years into their career to see if they had reached their perceived potential as teacher leaders. The results of the study revealed that the teachers who worked in schools where teacher leadership and teacher voice was encouraged, had the highest satisfaction in their job. Those teachers with lower work satisfaction or who were disengaged from their work, felt that teachers were not valued for their opinions and they had a lack of control in any decision-making. Cameron and Lovett (2015) concluded by recommending that schools create more space and opportunities for teachers to lead and that schools with teacher leaders were more likely to retain experienced teachers. The literature also points to evidence that teacher leaders are (a) more satisfied with their work, (b) more likely to improve their instructional practices, (c) less likely to "drift or detach" at the mid-career point (York-Barr and Duke, 2004), (d) the most motivated faculty on school-wide projects, and (e) more likely to have higher self-esteem (Muji and Harris, 2003; York-Barr and Duke, 2004). Barth (2001) summarized these positive effects by writing, "teachers' lives are enriched and energized in many ways when they actively pursue leadership opportunities…teachers who lead help to shape their own schools and, thereby, their own destinies as educators" (p. 445).

Perhaps it is fortuitous that teacher leadership is not easily defined. This allows for competing definitions that can range from more traditional forms of leadership to the most inclusive forms imaginable, such as informal teacher leadership. The literature on teacher leadership is varied

and growing. It is a strong companion to the already robust literature on distributive and shared leadership theories.

## Chapter Conclusion

The field of teacher leadership has a robust and expanding catalogue of scholarship. Its appearance in recent decades has become a sign of increased interest in more democratic and shared forms of leadership in schools. The topic of teacher leadership has been written about since the early 1990s, but there is still room for discovery and research. The literature I encountered on shared leadership models and more democratized forms of leadership prompted me to investigate teacher leadership more closely. In doing so, I became interested in studying what is perhaps the most democratic form of teacher leadership: teachers who lead without any formal title or compensation. As this literature review demonstrated there is very little research in this area and studies of teacher leaders rarely differentiate between informal and formal teacher leadership.

The purpose of this study is to understand the phenomenon of informal teacher leadership. This literature review illustrates the need for further research in this area of teacher leadership to grasp more fully the unique phenomenon of non-positional teacher leadership. A review of democratic forms of leadership and teacher leadership was helpful in the construction of the four research questions that guided this study on informal teacher leaders.

- How do teacher leaders understand the concept of informal teacher leadership?
- What motivates teachers who have taken on informal leadership roles to create these roles in the first place and how have they gained the skills that they need to exercise their leadership role?

- What do informal teacher leaders consider to be the factors or conditions that encourage or discourage them from engaging in informal leadership?
- According to informal teacher leaders, how do they exercise their leadership and what is their perspective on the impact of their leadership on their school communities?

The preceding literature review established the need to understand more about this form of teacher leadership and illuminated the possible implications of informal teacher leadership on colleagues, students and the teacher leaders themselves. This chapter provided the theoretical foundations for creating such a study on informal teacher leaders and the following chapter will explain the design and methods for conducting the study.

# CHAPTER THREE: METHODS AND PROCEDURES

This study used qualitative methods, specifically a phenomenological approach to gain a needed understanding of the essence of informal teacher leadership. In this chapter, I explain the methods and procedures used to collect and interpret data for this study. This chapter begins with a description of the design of the study, the setting rationale and an explanation of the participants. A detailed description of the data collection, including the survey instrument and interview protocol is provided. Finally, the chapter ends by addressing issues of validity and credibility in the methods and procedures used throughout this research study, along with the limitations and delimitations of the study.

## Design of the Study

In order to understand more about informal teacher leaders, I took a qualitative approach to gathering and analyzing the data. As Creswell (2014) pointed out, qualitative research is best suited, "for exploring and understanding the meaning individuals or groups ascribe to a social or human problem" and this form of research underscores the, "importance of rendering the complexity of a situation" (p. 4). My use of the phenomenological research approach was best suited to the goal of the study which was to discern how teachers experience and understand the concept of informal teacher leadership. Phenomenology is a philosophical and qualitative approach to research that is designed to explore and understand the perceptions of individuals who have shared a common experience (Creswell, 2014). For this study, the phenomenon under investigation are the experiences of informal teacher leaders in public schools.

The purpose of this study was to understand more about informal teacher leadership and to answer the four guiding research questions:

1. How do teacher leaders understand the concept of informal teacher leadership?

2. What motivates teachers who have taken on informal leadership roles to create these roles in the first place and how have they gained the skills that they need to exercise their leadership role?
3. What do informal teacher leaders consider to be the factors or conditions that encourage or discourage them from engaging in informal leadership?
4. According to informal teacher leaders, how do they exercise their leadership and what is their perspective on the impact of their leadership on their school communities?

The phenomenological research method is appropriate to answering these questions because I adopted a social constructivist approach to my research. Through my research, I sought to uncover the ways that people interact in the world through their lived experiences (Dowling, 2007; Creswell, 2014). There are many types of phenomenological approaches because the original concepts associated with phenomenology were more philosophical in nature, rather than methodological (Dowling, 2007). Following World War One, the founder of phenomenology, Edmund Husserl, began writing about the concept in terms of its use in philosophy and understanding human behaviors. It was not until the 1970s that psychologists created an actual praxis for using the philosophy as a research method (Groenewald, 2004). Due to its origins as a philosophical concept, rather than a method of research, there are a variety of ways that researchers apply the concept to their research.

Many researchers who use phenomenology explicitly do not want to create or conform to a set of rules because it would limit its effectiveness. The premise of phenomenology is that the researcher does not know exactly what they will find when they are in the field collecting data. They are not necessarily testing objective theories, as a quantitative research study might (Creswell, 2014). The job of the researcher is to allow the participants to lead the researcher into

their lives, rather than the researcher leading every part of the process and possibly miss the essence of the phenomenon (Groenewald, 2004). While there is not complete agreement on every aspect of phenomenological research, Creswell (2007) did identify what remains at the core of all phenomenological methods. All phenomenological studies aim to document and understand how people live their experiences. Researchers assume that people are aware enough of these experiences to be able to identify them and that the researcher can collect descriptions of these experiences. During the collection process, the researcher must try to limit analysis, using an inductive approach to understand the phenomenon under investigation. For this study of informal teacher leaders, I did not seek to prove my own theories of informal teacher leadership. It was of critical importance to me that the participants describe their own experiences and perceptions of informal teacher leadership. These experiences formed a body of evidence that I analyzed and through which I made meaning. It was within the participant teachers' descriptions that I created a clearer picture of the phenomenon of informal teacher leadership.

For the purposes of this study, a version of phenomenology referred to as New Phenomenology or American Phenomenology was used. This version of phenomenology is explicitly designed to learn more about how persons understand their situation and the phenomenon under investigation, rather than the objective reality of their experience. In this way, this specific method takes into account the cultural realities that exist in people's lives and looks for the subjective understandings of the people experiencing the phenomenon (Dowling, 2007).

This version of phenomenology is clearly aligned with the social constructivist worldview in that the researcher understands that people live in subjective realities and that people assign meaning to these realities as they interact with the people and objects around them.

Creswell (2014) wrote that researchers who subscribe to a social constructivist worldview "focus on the specific contexts in which people live and work in order to understand the historical and cultural settings of the participants" (p. 8). This study seeks to understand how informal teacher leaders understand the concept of this form of leadership, making this form of phenomenology best suited to the intent of this study. I did not set out to prove a theory about informal teacher leadership. Instead, I used an inductive method of research that relied on collecting the data directly from informal teacher leaders, thus allowing their experiences to reveal patterns and themes. Through the surveys and interviews of informal teacher leaders, the ways in which informal teacher leaders behave and experience their role became clearer.

**Role of the researcher**

Before explaining in detail, the methods and procedures used for this study, it is essential that I, as the researcher, explain my own relationship to the topic of teacher leadership and make the reader aware of the subjectivity that may have influenced the research, design of the study, the development of the data collection tools. In this chapter, although I explain the steps that I took to reduce the effect of biases, there are also times when my own experiences aided in the creation and execution of the research because of my subjective experiences as a public-school teacher.

By explaining my own experience with the phenomenon of teacher leadership and making this experience transparent to the reader, I provide the opportunity for the readers to judge for themselves the merit of the study; this is an important step to validating the findings, by bracketing my own experiences with the phenomenon (Creswell, 2007; Chan, Fung, & Chien, 2013). According to Moustakis' theory of Transcendental Phenomenology, researchers must strive to outline their own ideas and experiences with the phenomenon they are studying, in order

to shed those presumptions and approach their research with a fresh and open mind, or as he called it, “epoche” (as cited in Creswell, 2007). While some of these experiences have the potential to bring biases to the study, they can also provide a rich resource to the researcher. I cannot be a completely blank slate and therefore must understand how to use my previous knowledge to help in my research, while also being careful to not make assumptions about the participants and the meaning of the data. Bracketing allowed me to acknowledge my experiences and also created a method for me to put them aside when appropriate

I offer a brief narrative of my own experiences and history with informal teacher leadership to help the reader understand my perspective on this topic. Later in this chapter, I revisit the idea of bracketing and the research techniques I employed to limit biases from clouding the research and analysis. I have taught high school history for the past sixteen years. I have had the opportunity to teach in two public school districts, the first being a mid-size suburban high school for four years. In the last 12 years, I have worked in a large, well-resourced high school, located in an affluent urban setting. The school I work in has many opportunities for teachers to take on formal leadership positions and for the past ten years, I have split my history teaching with a formal teacher leadership position leading a school-wide program. This teacher leadership role is compensated by giving me two class releases. Therefore, I teach fewer classes than my fulltime counterparts. This is not the only formal leadership position I have occupied in my career. I have also served as a mentor to new teachers, led professional development groups, served on formal committees that were compensated by stipends or duty releases, and chaired our student/teacher legislature, among other jobs. In addition to being a *formal* teacher leader at my school, I fulfilled many informal teacher leadership roles that have not been compensated. I have worked on curriculum teams with

fellow teachers to teach and learn about new strategies in our subject area, volunteered to serve on committees on my own time and without compensation, I am also an active member of my school's faculty and often speak up in faculty meetings to encourage the administration to make choices that I believe are good for our students.

I write all of this to offer complete transparency in that I identify with the label of "teacher leader" in both the formal and informal sense of the term. I believe that I have done many of the jobs described as both informal and informal teacher leadership in the literature. I believe that these roles have helped me to become a more effective teacher for my students and have positively impacted my school community, my career, and myself personally. This study of informal teacher leadership was a way for me to figure out how other teachers in public schools experience the same concept of leadership. I wanted to know if other teachers had experienced the phenomenon of non-positional teacher leadership and how those experiences differed or were similar between teachers and schools. In the validity and credibility section of this chapter, I will describe the ways in which I tried to validate my study and bracket my experiences.

## Study Participants

The data collection for this study occurred in two parts, the first being a survey and the second being interviews. There were no field observations of the teachers who participated in the study and all information gathered was self-reported by the teachers themselves. The survey was sent out to high school and middle school teachers only in Eastern Massachusetts, in order to allow for the possibility of meeting for a subsequent face-to-face interview. To find a diverse pool of participants, emails were sent out to teachers around Eastern Massachusetts directly, inviting them to take a 10-minute survey about teacher leadership. These emails were sent out to the faculty of randomly selected schools from three urban, three suburban, and three rural

districts. Teacher email addresses were acquired from publicly accessible school websites and every staff member who was listed as "teacher" was included in the email asking for their voluntary participation in taking the survey. Teachers that were emailed included core subject teachers, such as math and history and non-core subjects such as physical education, art, music and special education teachers were included in the outreach. After emailing teachers in these nine locations directly, I contacted formal leaders such as department chairs and principals at five additional suburban and rural schools asking them to forward the survey to any teachers that they thought might be interested in sharing their thoughts on teacher leadership. Finally, I contacted six teachers whom I know professionally, but who do not work in my district to see if they wanted to participate or send the survey along to other teachers in their professional circles. The majority of these six teachers work in suburban or urban school districts and did forward the survey to their colleagues to see if there was any interest in participating. Overall, 20 schools in Eastern Massachusetts were contacted with information about the study and a link to the survey.

**Survey Participants**

There were two groups of participants in this study. The first group included any educators who decided to participate in the survey. The surveys did not ask respondents to name the school or community they taught in, other than the grade level, and participants remained anonymous, unless they opted to participate in the interview phase of the study. Of the 111 survey respondents, 20% were middle school or junior high teachers and the other 80% were high school teachers. No other information about the teachers' settings was collected in the survey. The goal of this survey was to gain information from educators, including formal leaders about their perceptions of informal teacher leadership. It was also a survey designed to find informal teacher leaders who could share their experiences. While administrators and all teachers

were permitted to take the survey, the target for the survey was to get more information from participants who were not currently in formal leadership positions. Of the 111 participants who responded to the question about their current position, five were current administrators, 32 were formal teacher leaders, and 68 had no formal leadership position in their school in the past two years. All of the teachers who had no formal leadership positions exhibited several leadership behaviors as define by Fairman, J. C., & Mackenzie, S. V. (2012).

**Interview Participants**

Teachers who self-identified as acting in a way that could be described as an informal leader, were asked if they wanted to participate in the second phase of the study which was a one-hour interview. Forty-three respondents answered this final request for an interview and 55% percent declined participation in the interview phase, while 45% were willing to participate in an interview. I contacted all those who were willing to participate in the interview within one week of their taking the survey. I used the email address that they provided in their response to the survey. My email explained again the goal of the study and the parameters of the interview and I offered potential times for interviews. Potential participants were given the choice of conducting the interview in person, on the phone or via video conferencing. Ten teachers responded positively to the follow-up emails and scheduled a time for their interview. Participants chose a variety of ways to conduct the interview, two chose to use a videoconference, four chose to meet in person, and four chose to do their interview via phone call. Once participants had responded positively to the email requesting an interview and had chosen a date and time for the interview, I sent another email explaining their rights as participants in the study and attached a consent form for them to read and sign (see appendix C). All participants signed and sent me their consent forms before the interview date and time. Of

the ten teachers who were interviewed, two were male and eight were female. As a point of comparison, out of all of the respondents who participated in the survey, 36% were male, 68% were female, and one percent was gender nonconforming. The level of teaching experience of the interviewees varied with two having taught three years, one having taught five years, six having taught between 10-20 years, and one having taught over 20 years. The interview participants did come from different school environments as described in the setting's rationale.

Of the 10 participants who were interviewed, one worked in a rural, regional high school, two worked in urban school districts, and the other 7 worked in suburban school districts. Nine of the interviewees were high school teachers and one was a middle school teacher. Several of the teachers interviewed mentioned working in different environments throughout their career, but all participants independently decided to focus on their current work environments in responding and providing examples for the interview. This was not a requirement of the interview and the teachers were never directed to only talk about their current environment. Table one presents the demographic data collected from the 10 interview participants.

Table 1:

*Interview participants' demographic information*

| Participant Label | Teaching Environment | Years Teaching | Level of Education | Gender | Race |
|---|---|---|---|---|---|
| Participant A | Suburban High School | 10-20 | MA + 45 graduate credits | Male | White |
| Participant B | Suburban High School | 4-9 | MA | Male | White |
| Participant C | Suburban High School | 10-20 | MA+30 graduate credits | Female | White |
| Participant D | Suburban High School | 4-9 | MA | Female | White |
| Participant E | Suburban High School | 10-20 | MA | Female | White |
| Participant F | Urban High School | 1-3 | MA | Female | White |
| Participant G | Rural Regional High School | 10-20 | MA + 45 graduate credits | Female | White |
| Participant H | Suburban Middle School | 10-20 | MA + 45 graduate credits | Female | White |
| Participant I | Urban High School | 10-20 | MA + 45 graduate credits | Female | White |
| Participant J | Suburban High School | More than 20 years | MA + 45 graduate credits | Female | White |

## Data Collection Methods

This study used two data collection methods, a survey and interviews, to gain a better understanding of the phenomenon of informal teacher leadership. In this section, I will explain the protocols for the survey and the interviews.

### Survey Protocol

In order to find participants for the interview portion of the study, I created a survey to send out to a random set of teachers from across Eastern Massachusetts. The goal of the survey was to identify possible informal teacher leaders and ask them if they would be willing to participate in the interview phase of the study, as interviews are widely considered the best way to gain a deeper understanding of a phenomenon under investigation (Creswell, 2007). The survey was a mix of close-ended, multiple-choice questions and open-ended, short-answer

questions. The survey was created on a platform called Qualtrics and was distributed exclusively via email, through a live link to the survey that was open for four weeks. The survey went through three drafts and a small pilot test before being sent to potential participants.

**Pilot Survey.** After reviewing two drafts of the survey with my dissertation committee, I piloted the survey with fifteen teachers whom I knew personally, individuals I was confident would give me honest feedback. The fifteen teachers represented a variety of curriculum areas or departments and could be considered informal teacher leaders. Pilot participants were made aware that their responses would not be included in the study and that the feedback that they offered on the survey would be used to revise the survey for a future study used in a dissertation. Feedback from this pilot group was extremely helpful. Pilot participants pointed out parts of the survey that seemed cumbersome or confusing. Interestingly, the most important feedback received from this survey testing was that participants were requiring only five to seven minutes to take the entire survey. The pilot showed that a few more open-ended questions could be added without taxing the participants with a lengthy process.

While the primary purpose of the survey was to identify possible interview participants, the survey was also an opportunity to collect meaningful data on informal teacher leaders. For example, formal teacher leaders, who could not be interviewed, could provide valuable examples from their own experience with informal teacher leaders. In addition, informal teacher leaders who did not want to be interviewed could provide written answers to some of the key research questions so that their answers could be included in the data analysis. After making changes based on the feedback and reviewing the changes with my dissertation advisor for approval, the survey was sent to a different set of seven teachers to test the final draft of the new survey in order to make sure that it was clear, did not take more than 15 minutes to complete, and yielded

the type of data needed for the study. Consequently, a total of 22 individuals participated in the survey instrument pilot.

**Survey**. The survey sent to participants included a total of 15 questions (see Appendix A). The first question asked participants to consent to using the data collected for use in a dissertation and included contact information for relevant people associated with the study. Questions two through six were demographic questions including what grades the teacher taught, amount of years of experience, gender, ethnicity, and level of education obtained. Questions seven and eight were designed to find out how many formal leadership positions the participants had occupied in their career and if they were currently a formal leader, either administrative or as a formal teacher leader. Educators who noted that they were currently in a formal leadership position were directed to a part of the survey designed for formal leaders. This group of formal teacher leaders were asked three questions, which included whether they saw themselves as teacher leaders. They were also asked two open ended questions in which to share a time when they believe they acted in a way that could be described as informal teacher leadership and to describe a time when they witnessed a colleague acting in a way that could be described as informal teacher leadership. After these three questions, these participants were thanked for their contribution and the survey ended.

For teachers who answered that they had not had a formal leadership position in the past two years, the survey directed them to a series of six questions. The first was designed to identify teachers who behaved in ways that are associated with teacher leadership. Using Fairman, J. C., & Mackenzie, S. V. (2012) list of teacher leader behaviors, teachers were asked to click any and all of the 8 behaviors that they had engaged in over the past two years; these behaviors ranged from “experimentation and innovation in the classroom” to “collaborating with

students and parents for school improvement." All teachers who answered this question chose multiple behaviors that they believed that they engaged in, without having any formal leadership roles.

Participants were then asked to provide some specific examples from the past two years of the behaviors they choose in the earlier question. Following that question, participants were asked to give examples of times when they believed they acted as an informal teacher leader and when a colleague did so. In order to help answer the research question about motivation for teachers to become informal teacher leaders, one survey item listed nine motivations for behaving as an informal leader and asked participants which of the motivations applied to their own experience. This question also offered a space for teachers to identify any motivations that they felt was not on the list. The participants were asked if they identified themselves as teacher leaders and, finally, teachers who had no formal leadership position were asked if they wanted to participate in the interview portion of the study and were given the opportunity to leave an email contact.

**Survey Distribution**. Survey distribution was done over the course of three weeks. First, the survey was sent to teachers that I knew professionally and personally, but who worked in different districts than myself. Due to the more personal relationship I had with these teachers, a particular emphasis was placed on the fact that if they chose to send the survey to their colleagues and contacts, they must make it clear that there was no obligation to take the survey. I drafted a message that I asked them to use when sending the survey out. This message clearly stated that there was nothing to be gained by taking the survey and they should only take the survey voluntarily. I sent out this email to six teachers in Eastern Massachusetts. In the same week, I emailed every staff member listed as a teacher in three urban, three suburban, and three

rural schools in Massachusetts. I used a map of school districts in Eastern Massachusetts and researched basic demographic information on each district to see which would constitute rural, urban, and suburban[1]. Six out of the nine school districts that were included in the first email blast were eliminated and only districts in which the researcher had no previous relationship were chosen. Districts in Eastern Massachusetts were assigned a number and the researcher used a random number generator to pick the three districts for each category. Emails were sent to both the high school and middle school teachers, based on the email lists that were provided by the public school's website. These emails included a message that introduced myself as a doctoral student at Lesley University and explained briefly what the study and survey were about. Teachers were asked to take the survey if they were interested in participating.

In the second week of the survey distribution I asked the department chairs of one rural, one urban, and one suburban school if they would forward the survey to teachers that they would consider teacher leaders or who would possibly be interested in the topic of teacher leadership. This email also included a brief description for the Chairs to use when sending the email to their teachers. The email explained that I had no personal or professional connection to their supervisor, that the survey was confidential and could not be accessed by their supervisor, and that participation was entirely voluntary.

The survey was kept active for four weeks after the first emails were sent out, however, the majority of the responses came in within the first three weeks of the survey period. Some teachers did contact me to find out how they were chosen to receive the survey and I replied to

[1] For the purposes of this study, urban was considered a community with a higher population density and had a population of over 100,000. Suburban schools might also be located in communities with more than 100,000 residents, but the density of population is not as concentrated as the urban locations. Finally, rural communities were determined based on their sparser population density and having less than 100,000 residents.

all of these requests by explaining the process of randomly generating the schools and emails. Overall, 111 educators took some portion of the survey and the majority of those who took the survey (68 out of 111) self-identified as exhibiting informal teacher leadership behaviors.

**Interview Protocol**

Interviews are considered one of the best methods for gaining a deeper understanding of a phenomenon under investigation (Creswell, 2005). It was essential for me to have the ability to ask in-depth questions to several people who identified as informal teacher leaders. While the surveys provided some detailed responses, the format encouraged short responses and did not allow me to inquire further into the details of any response. If respondents were identified as informal teacher leaders, at the end of the survey, they were asked about their willingness to participate in a one-hour interview to be scheduled at their convenience.

**Contacting participants.** Within a week of their taking the survey, I contacted participants directly to thank them for considering participating in the second phase of the research on informal teacher leadership. I explained the purpose of the research and that the second phase of the study included a one-hour interview to answer questions about their experience with informal teacher leadership. I told participants that all information was confidential, and that I could conduct the interview in the mode they preferred including in-person, videoconference, or via a phone call. Respondents were then asked to select from options for a time and mode of interview within a two-week period. Once the interview was confirmed, I sent a second email thanking them again and attaching the consent form for them to read and sign before the interview.

**Interview protocol.** The interview protocol development process was similar to the survey. I formulated and categorized separate sections for the interview questions in order to

address the four different guiding questions for the study. The first two questions of the interview were aimed at collecting contextual information about the environment the teacher worked in. This part was added after I piloted the interview with three colleagues. One of the pilot participants pointed out that she had taught in three different schools and wanted to know which one she should draw her examples from (the response being all of her experiences were valuable to the research). The other two pilot participants often used phrases like, "you know how it is here", in reference to the school we both worked in. This helped me to understand that I needed to ask interviewees to explain the context in which they work, since I would know nothing about their schools before interviewing them. The interview protocol appears as Appendix B. Following is an explanation of how the four parts of the protocol were constructed.

***Part one of interview***. Part one of the interview protocol was designed to help answer the guiding questions concerning participants' conceptions of teacher leadership. Participants were reminded that there were no right answers and that the researcher was looking for the participant's understanding of the phenomenon of teacher leadership. The goal was to allow the interviewees to answer questions in a way that could illuminate the experiences of these teachers, rather than seeking answers that fit my own understandings of teacher leadership. The researcher should not try to prove an existing theory when gathering data for a phenomenological study (Groenewald, 2004). As a result, the protocol included open-ended questions that kept the participant on a general topic, while encouraging the person being interviewed to elaborate and lead the answer in whatever direction felt natural for them (Weiss, 1994). Four questions were included in this part of the interview instrument (See Appendix B). Participants were invited to offer their understanding of the difference between teacher leadership and informal teacher leadership. I asked this in order to get a sense if educators in the field have the same

understanding as researchers and scholars do about the two concepts. Following this first question in this part of the interview, I took the opportunity to clarify that anytime I used the term "teacher leader" I would be referring to their understanding of an informal teacher leader. This was done to make sure that the focus of the participant's answers was on the topic of the study, rather than gathering information about formal teacher leaders. If it was unclear if they were referring to formal or informal teacher leadership, I sought clarification and recorded their answer to be sure that I was interpreting the answers correctly.

Teachers were asked what reasons they might have for calling a colleague an informal teacher leader. This was used to gather more information about what teachers think informal teacher leaders do and what types of behaviors they exhibit or actions they take. Following this question, I asked the participant about a specific item on the survey in which they answered whether or not they identify as a teacher leader. This was a multiple-choice response on the survey and provided an opportunity to seek out more information about why they did or did not accept the label of teacher leader. Finally, part one ended with a question that sought to understand how conceptions of teacher leadership might change overtime for educators. I asked the teacher to give me an example or a story of how their understanding of teacher leadership has changed overtime.

***Part two of interview***. In the second part of the interview, I told the participant that I was trying to understand what skills teachers might need to be a teacher leader and how they might acquire these skills. This part of the interview started by asking the interviewee what difference they thought there was between a classroom teacher and an informal teacher leader. They were then asked what skills they felt were necessary for being an effective leader. The next three questions were designed to find out how teachers acquired the skills to be a non-positional

leader. The questions posed included whether or not participants had ever attended a professional development workshop that taught them skills about being an effective leader, whether or not they had experiences outside of teaching that helped them to develop as a leader, and if they had any family members, friends, or mentors who inspired them to be a leader.

***Part three of interview***. Part three of the interview was a series of seven questions that probed participants' perspectives on the variety of motivations and factors that encouraged and discouraged their ability to lead informally. I asked teachers to share an experience in which they encountered a problem that motivated them to take leadership in order to solve it. Once teachers related the story, I followed up by asking them to explain exactly how they went about solving the problem. Teachers were also given the opportunity to provide a hypothetical problem that might arise that would potentially motivate them to take on an informal leadership role. This was useful for the teachers who had less teaching experience and who were more reticent to speak up without tenure, perhaps for fear of being targeted as a trouble-maker. While the majority of the participants used actual experiences that they had acted in, the hypothetical option was particularly helpful for one teacher who felt that her work environment was hostile to teachers trying to help solve problems. In both of these scenarios, teachers were asked to explain what impact they thought their actions had (or could potentially have) on the school community.

After asking about problems that motivated these teachers to act as informal teacher leaders, the following question asked participants what things besides problems motivated them to act in ways that could be described as informal teacher leader. I asked participants to identify their primary motivation for taking on an informal teacher leadership role. I then asked a follow up question about whether or not they had any ambition of becoming a formal leader at some point in their career. This part ended with questions that asked participants to describe the

people and other factors that encouraged and discouraged teachers from engaging in leadership behaviors.

***Part four of interview***. The final part of the interview protocol was focused on having teachers elaborate on examples that they provided on the survey. This was a way of extending the amount of detail and description that they provided about the types of actions they engaged in as an informal teacher leader. I read the survey responses the participant reported in their survey to refresh their memory. I then asked for more details about the experience they recounted in the survey along with any other examples they could think of that they did not write in the survey. Not only was I seeking to understand what actions they took, I also wanted to know more about how participants in my study believed those actions impacted their school and especially their students or colleagues. The final two questions of the interview were about the teacher's perception of the possible positive and negative impact of informal teacher leadership on the teacher herself, her colleagues, her students, the teaching profession or public education as a whole. The interview ended with participants being asked if they felt they had the chance to tell me everything they were thinking about informal teacher leadership and if there were any question they wished had been asked.

**Interview process and management of data.** I began each interview by going over the consent form that the participant previously signed and making sure that there were no lingering questions before the interview began. Participants were reminded that the interview would be recorded and that a transcript of their interview would be made and sent to them for review, at which point they would be permitted to remove or add anything they wished regarding their responses. Phone interviews were recorded using an application on my iPhone called "TapeACall Pro." This created an exact audio recording of the conversation and was then saved

to a password-protected folder in Dropbox. Interviews that were done via Skype were recorded using QuickTime on the computer and a backup recording was done using Voice Memo on my iPhone. These were also immediately placed in a password-protected folder in Dropbox. Finally, interviews that were conducted in person were recorded using my iPhone Voice Memo application and were immediately sent to the same Dropbox folder, upon completion of the interview. In addition to recording the interviews, I printed a physical copy of the interview protocol, so that I could take notes as the interview progressed. These notes were scanned into a PDF and placed in password-protected folder. The physical copies were destroyed within 24 hours of the interview.

I used a stopwatch to keep track of the time and all interviews lasted between 50 and 70 minutes. Immediately following each interview, I spent approximately half an hour recording my own thoughts and observations on the interview in order to capture my impressions. These were typed into the field notes and placed in the password-protected Dropbox folder.

**Transcription of interviews.** A researcher assistant was hired to transcribe the interviews verbatim. She was chosen based on her experience transcribing interviews for journalists that work for news publications known to maintain a high degree of accuracy and accountability. I met with the assistant for 90 minutes to train her on how to transcribe the interviews and how to ensure the anonymity and safety of the data. In this training, I explained the interview protocol along with the context of the interview and the importance of getting a verbatim transcript of the answers that the teachers provided. The transcription assistant was given time-limited access to the recordings through a temporary password to the Dropbox folder. After completing one transcription, we spoke again to review the transcript and confirm procedures expected for the process. The assistant had no knowledge of the names of the

participants at any time or any names of the schools that the teachers worked at. She placed digital files of the interview transcriptions into a Dropbox folder which she relinquished access to one week after completing all of the transcripts. She did not keep any copies of the recordings or transcripts once she was done. As each transcript was completed I did an initial reading to confirm that the transcribed session file was correctly identified and that the content in general was in keeping with the actual interview that took place. Once the transcripts were completed and approved, each participant was sent a copy of the transcript in order to provide them with an opportunity to revisit their answers and correct, add or retract any part of the interview, a process known as "member checking."

## Data Analysis Procedures

Once all of the data from the survey and the interview were collected, I made a plan for data analysis. First, the information from the survey, which included both qualitative and quantitative data, needed to be considered. Eventually, this information was combined with the interview data, which required a different approach to my analysis, as the content was completely qualitative. All data were broken into categories and coded to help find patterns and bring meaning to the information that was collected (Saldana, 2011). My procedures for analyzing the survey and interview data are outlined below.

### Survey Analysis Procedures

I started my analysis by dividing the survey data into two major sections: data relevant to educators who are now, or have previously been formal teacher leaders, and data relevant to those who self-identified as only having been informal leader leaders. For both of these groups of survey participants, I organized the data according to the categories of teacher leadership behaviors provided by Fairman & Mackenzie (2012). In addition, I created a ninth category to

record data indicating any behaviors that were described that did not adhere to the Fairman and Mackenzie list. Once units of meaning from the surveys were initially coded according to one of the nine categories, a second round of sorting began in order to associate units of meaning that could be attributed to multiple categories. After coding all of the written responses from the survey, I went through and highlighted repeated terms or phrases that were associated with each category of behaviors, as well as recording the behaviors that did not fit into a specific category. Most of the survey responses were succinct, which made it unnecessary to break the information into smaller units, unlike the data from the interviews. Although the data from formal teacher leaders and informal teacher leaders were separated in the beginning of the coding process, I did not note a discernable difference in the meaning attributed to teacher leadership between the two groups. This made it possible to eventually combine the data from the two groups in the final phases of analysis.

**Interview Analysis Procedures**

Interview data were much more voluminous and cumbersome to code and analyze for themes. After completing the interview, the first step of my data analysis plan was to transcribe the interview verbatim, in order to organize the data and code the information provided. An experienced professional transcribed each interview. In order to ensure that the transcripts were verbatim, I listened to the interviews while doing the initial reading of the interview transcripts. This process allowed me to checked the transcriptions for accuracy and review the interviews again as I prepared to code the data. As I listened to the interviews, I made notations on the transcript and included emotional cues, such as excitement, anger, annoyance, in order to record the parts of the experience that could not be capture by simply reading a transcript. These

notations were then combined with those I took during the interview and immediately after the interview to form a more complete synthesis of the data.

To maintain the anonymity of the interviewees, I assigned each interview transcript a letter to replace the name of the interview participant, as illustrated in Table One. These letters are used throughout Chapter Four to identify the ten teachers who were interviewed for this study. Survey participants were not given letter codes, as the data from the surveys did not require identification of individuals.

To begin the process of sorting the interview data I created units of meaning that could fit into one or more categories based on the frequency of the responses from interviewees. For this first phase, both direct quotes and paraphrasing were noted and sorted with similar items. For example, categories such as "motivation for ITL" or "defining ITL" grouped all data relating to these categories together for further analysis.

During the data sorting process, I also noted when concepts, ideas, and phrases were repeated by multiple participants and that crossed over multiple categories. These repeated concepts were then named in order to create more inclusive categories of meaning. Sometimes the larger category matched the repeated terms such as "motivation," while at other times, a new concept emerged outside of the larger categories originally listed. For example, the topic of colleagues came up many times in multiple contexts during the interviews. In addition to the categories associated with research questions, I also created new categories such as "colleagues" to sort for meaning. Revising and adding categories across multiple questions allowed me to see past the original categories to find any common themes that gave a clearer understanding of a concept that was present across interview questions. By the end of the second phase of sorting and categorizing, a summative statement was written for each category of meaning which explored

the connecting threads between the data in that specific category. Eventually, these summative statements formed the foundation of longer explanations that became the content of Chapter Four and that led to my six findings.

## Validity and Credibility

I took several steps from the start of this study to add validity and credibility to the results. When crafting the survey and interview questions, I paid close attention to the existing scholarship about teacher leadership. While there is not a tremendous amount of concentration on informal teacher leaders, there is a robust body of literature devoted to teacher leadership. Incorporating previous knowledge gained from well-respected scholars is one way of increasing credibility in any study (Saldana, 2011). After reading many texts describing teacher leaders, I used a comprehensive list of behaviors created by Fairman, J. C., & Mackenzie, S. V. (2012), which was compiled after conducting their own extensive literature review and multiple studies on teacher leaders. These lists of behaviors were then minimally reworded for participants to be able to easily recognize the behaviors listed in the survey.

I drafted both the survey and interview protocol several times and they were approved by the dissertation committee to reduce possible bias. Both protocols were piloted with teachers to check for usability and to make sure that the protocols achieved their stated goals. In addition to using concepts from scholars in the field, I used multiple sources to gather information about informal teacher leadership including quantitative and qualitative data from both a survey and more in-depth responses from the interview. This method of collecting data from multiple sources and lenses is referred to as triangulation and it is used to ensure that the information gathered comes from multiple places, making it less likely that one single method of collecting the data dramatically influenced the results (Shenton, 2004).

**Participants and Timing**

Participants of the survey and interview were informed of the goal of the study and their rights as participants. All participants were given the opportunity to contact me directly, or the institutional review board (IRB) committee at Lesley University for any questions pertaining to the study before or after participation. The timing of the study was not rushed. Creation and piloting of the protocols took over two months. This provided time to revise and refine the final survey and interview. The survey instrument was open for approximately four weeks and interviews were scheduled and conducted within a three-week period. All data collection was completed within seven weeks. In order to make sure that the information that was collected from the interviews was truly what was said in the conversation, a recording of the interview was made, in addition to the notes that I kept during the interview. Once verbatim interview transcripts were created, participants were emailed a copy of the transcript and allowed to retract or add to any of their responses. This was done to increase the validity of the results (Groenewald, 2004). The 111 survey responses and 10 interviews that were conducted provided a broad range of responses that could be used to generalize the findings. Ten interviews are considered a large enough sample in most phenomenological studies to be able to claim that the data is credible (Groenewald, 2004).

**Trustworthiness of Analysis**

The use of qualitative data requires the researcher to strongly consider their own biases and interpretations of the information they are receiving, as it is more likely that their own ideas can influence the conclusions that are reached based on the data. Bracketing is the, "Deliberate putting aside one's own belief about the phenomenon under investigation or what one already knows about the subject prior to and throughout the phenomenological investigation" (Chan,

Fung, & Chien, 2013, p.1). Using bracketing throughout the research process increases the credibility of the study because it makes transparent to the researcher, and the reader, what ideas and thoughts existed before the data was collected, while the data was collected, and while the data was analyzed. In order to bracket my experiences and ideas about informal teacher leadership, I kept a reflexivity journal in which I recorded my assumptions and how I went about inquiring about my research (Chan, Fung, & Chien, 2013). This journal was a word document where I collected all of my personal reflections on my data collection throughout the research process. I did this in order to have a record of my own thoughts and biases that I could referred to during the analysis phase. The journal helped me in identifying signs of my own bias in the analysis; however, I acknowledge that there is no way to remove all biases from the data collection and analysis. The journal allowed me to contain my own ideas separately from the expressed ideas and thoughts of the participants. I created the reflexivity journal at the beginning of the study and I continued to use it throughout the interview process and at the start of the data analysis. In addition to bracketing my ideas, my dissertation committee helped me by reviewing my protocols so that biased or leading questions were eliminated and replaced with questions that allowed participants to describe their experiences with informal teacher leadership.

In addition to the reflexivity journal, I practiced my interview techniques with three teachers to gain more confidence in the skills necessary for conducting an interview that was free from bias. For example, I made sure to speak plainly and not introduce vocabulary that the participants would not necessarily know without extensive knowledge of the field (Groenewald, 2004). I explicitly stated in each interview that there were no right answers to questions and that I was simply seeking to record their understanding and experiences with informal teacher leadership. I rarely interjected my own thoughts during interviews and if I did insert myself, it

was only to seek clarity about their response. I did find it sometimes necessary to repeat what the participant said to ask if I understood and repeated their response correctly. Most questions were left open-ended to allow for participants to take the lead in their answer (Chan, Fung, & Chien, 2013). Occasionally, an interviewee would say something like, "Is that what you were looking for?" or "I'm not sure I answered your question". In response, I reminded them that I was not seeking a certain answer to any of the questions, and that any of their responses were appropriate. I believed that my task was to listen, record, and learn about the experiences of these informal teacher leaders and then decide what patterns and themes emerged (Dowling, 2007). Finally, in order to validate the interview responses, I member checked the interview transcripts by sending them to each participant and asking them to review their responses for any inaccuracies. All interview participants agreed that their transcripts accurately represented the responses they gave me during their interviews.

## Delimitations

The purpose of this study was to understand more about how informal teacher leaders conceptualized their role, what motivated them to lead, and the possible impact of their leadership in school communities. This was a small-scale study for the purposes of a dissertation and therefore, there are several delimitations of the study. First, the method of qualitative research that was used, phenomenology, was expressly chosen over other methods because it served the purpose of the study best. While the topic of informal teacher leadership could be covered in another type of qualitative study, the nature of the research questions lent themselves to a phenomenological study that could gather the experiences of many informal teacher leaders. Since both a survey and interviews were used to collect data, more information could be gathered from a larger sampling of teachers. This allowed me to understand the experiences of many

informal teacher leaders who have all experienced the same phenomenon, which is the point of using this type of qualitative research method (Creswell, 2007).

Other delimitations included only surveying and interviewing middle school or high school teachers. While there are undoubtedly informal teacher leaders in pre-school and elementary schools, my background and certification are as a middle school and high school teacher. Focusing on secondary teachers allowed me to understand more about the context of their teaching environment, especially when it came to understanding the hierarchy of leadership within schools. I chose to only target teachers within Eastern Massachusetts for two reasons. First, as a teacher in Massachusetts, I am more familiar with state laws regarding teachers' work. As well, the necessity to provide participants with the opportunity to meet in person for the interview meant that the teachers surveyed needed to come from nearby towns and cities. Finally, due to the scope of the study being limited, all of the information gathered was taken from the perspective of informal teacher leaders. The phenomenological method encourages researchers to interact and collect data directly from the people who are experiencing the phenomenon. While data was collected from some administrators and formal teacher leaders, that information was minimally used in the analysis.

## Limitations

Limitations of the study should be considered when reading the results and analysis in Chapter Four. The most obvious limitation is that the teachers that participated in both the survey and the interviews were self-reporting their actions and I did not contact their colleagues to corroborate their examples or experiences. While I made an effort to reach a diverse group of teachers from a variety of school districts, most of the respondents and participants were women and all identified as white. While some demographic data was collected from the survey, there

was no question that asked respondents to identify what type of school they worked in such as rural, urban or suburban. However, this question was in the interview and all 10 interviewees were from different school environments, which does give some insights into the reach of the survey. Efforts were made to distribute the survey to both middle schools and high school teachers, however the majority of respondents were high school teachers, as were nine out of ten of the interview participants.

## Chapter Conclusion

Through the above processes and protocols and with a focus on the four core research questions, this study revealed significant insights into the understandings these teachers had of themselves as leaders and the salient themes around what supports and challenges them in their informal leadership. The following chapter explores these themes and insights and explains how my data analysis led to six findings about the phenomenon of informal teacher leadership. What emerged from my analysis were shared concepts from my participants about the dispositions that informal teacher leaders possessed. Data from the survey and interviews produced descriptions of the different ways that teacher leaders enacted their role. Participants also provided rich examples of how non-positional teacher leaders improved their schools and the data also demonstrated that these teacher leaders were highly devoted to their communities and valued working along-side formal leaders, colleagues, and students.

# CHAPTER FOUR: FINDINGS

Data gathered from the survey and interviews yielded rich results. Teachers who participated in this study provided copious evidence to analyze in order to understand the phenomenon of informal teacher leadership. What these participants revealed was a complex portrait of leadership that relies on building trusting relationships with colleagues and that is entirely devoted to improving schools and teaching. Chapter Four presents the findings derived from all of the data collected. The chapter is organized according to six thematic categories that were created after a multi-step analysis of the data. Each theme is broken down further into sub-themes to help orient the reader to the layers of complexities that exist in each category. Each theme starts with a brief introduction and is followed by analysis of data relevant to each subtheme. The thematic categories then conclude with a finding that was derived from the analysis presented. While the data collection and analysis were guided by the four research questions, once the analysis was conducted, the results are reported in a manner that cuts across these research questions. The chapter concludes by addressing the research questions specifically after all of the findings have been presented.

## Data Analysis

Once all of the data from the survey and the interview were collected, the process for analyzing the data began. First, the information from the survey, which included both qualitative and quantitative data, needed to be considered. Eventually, this information was combined with the interview data, which required a different method of analysis, as the content was completely qualitative. All data were broken into categories and coded to help find patterns and bring meaning to the information that was collected (Saldana, 2011). A detailed description of data analysis methods is outlined below.

**Survey Data Analysis of Formal Leaders**

One hundred and eleven educators took some portion of the survey. The participants included administrators, formal teacher leaders and informal teacher leaders. Data from the survey were exported into three separate Excel spreadsheets corresponding with the role of the survey participants as listed above. For example, administrator and formal teacher leader responses were separated from the informal teacher leader responses. Administrators and formal teacher leaders were asked to describe an instance when a colleague behaved in a way that was indicative of an informal teacher leader and any time they, themselves, behaved as an informal teacher leader during their career. These responses were divided and coded into two categories relating to research questions one and four of this study. These categories were labeled as

Label 1: Conceptions of informal teacher leadership

Label 2: How informal teacher leaders exercise leadership

Label 3: Potential impact of informal teacher leadership

Although data from these two groups of participants were kept separate from the informal teacher leader responses, because the focus of the study was on current informal teacher leaders, there was useful information provided by these participants about informal teacher leaders. The data from these two groups were used to determine if formal leaders had similar conceptions of informal teacher leaders as the informal leader had of the role they occupied. Formal teacher leaders were also asked the same question as informal teacher leaders about whether they identify with the label of teacher leader. This was done so that there could be a direct comparison with the ways that formal teacher leaders use the label teacher leader, as opposed to informal teacher leaders.

**Survey Data Coding**

Once the responses of the survey were imported into a spreadsheet, I printed and read all of the responses and made notes in the margins. These notes were used to draw out especially detailed responses or responses that were incomplete. This was done in order to deeper my familiarity with the content before beginning the coding process.

Once I familiarized myself with the content of the surveys, the coding process began. Each complete response was given a number that corresponded with one of the four research questions. Further readings focused on breaking down larger segments of the interview into smaller categories. Each of these parts were given labels that corresponded with the four guiding questions of the study. Because the research questions were broad and often contained more than one concept, more than four labels were used in order to simplify the data into very specific units of meaning. Table Two, below, shows the research questions of the study and beneath the questions are the labels that were used to divide the data in the survey.

Table 2:

*Survey Data analysis labels corresponding with research questions*

| **Research Question** | **RQ #1** | **RQ #2** | **RQ #3** | **RQ #4** |
|---|---|---|---|---|
| Label | Conceptions of informal teacher leadership | Motivations for taking on ITL role | Factors that encourage ITL | How informal teacher leaders exercise leadership |
| Label | Skills necessary for ITL | Method of obtaining skills for ITL | Factors that discourage ITL | Potential impact of informal teacher leadership on ITL |
| Label | | | | Potential impact on others |

**Interview Data Analysis**

The interviews for this study provided an especially strong opportunity to understand more about the phenomenon of informal teacher leadership. Interviews often form the foundation of phenomenological studies (Chan, Fung, & Chien, 2013; Creswell, 2007). Each participant was given a letter as an identifier and all names were removed from the analysis stage. The first step I took for analyzing the interview data was to read through the transcripts and note places in the interview where participants expressed ideas that stood out for its level of detail or with a particularly illustrative answer to the questions. In addition to reading the transcript of each interview, I listened to each interview and took another set of notes of impressions and thoughts. I then combined these notations with the field notes, which were written immediately after each interview had been conducted. By the end of this phase in the analysis, I interacted twice (in written and audio form) with each of the 10 transcripts and I had three sets of notes that formed the basis for my own thoughts and impressions. Interacting actively with the data is essential to gaining a fuller understanding of the meaning that the interviews held (Saldana, 2011). Taking notes each time I listened or read the interviews was an important step to bracketing my own thoughts before I began coding the data (Groenewald, 2004).

Coding of the interview data was similar to the survey data. I read each interview a second time and I highlighted text that matched the nine labels presented in Table One. I coded each interview by hand. In the first round, I went through the interviews on paper and labeled the data. Afterwards, I returned to the typed transcripts on my computer and cut and paste each body of information under a certain label into a master document corresponding to that label with the other interviews. For example, if Participant A had three sets of quotes that

corresponded with the label "skills necessary for TL," I cut and pasted those into a document that was solely devoted to that label, along with other participants' data with the same label. Finally, I added survey responses to these documents to form a full body of data that related to a certain label. This method allowed distinct categories of information to be examined without cluttering all of the data together. I analyzed each category for any patterns or themes within that given category. Once all of the categories were completed, I revisited the documents to see if any relationships between categories emerged (Saldana, 2011; Creswell 2014). For the purpose of illustrating themes and patterns that emerged, certain quotes were highlighted for their ability to exemplify the major ideas from the study.

After themes, patterns and relationships were identified, a description of what was uncovered was developed, while keeping in mind the earlier bracketing to make sure the analysis minimized the influence of my own biases. The final description was organized by presenting the summaries in accordance to the research questions that were posed. For example, an analysis summary was written to answer research question one and so forth. This organization is what resulted in an initial draft of this chapter; however, as I shared my initial findings with my committee and reread the initial findings, I quickly realized that I was limiting my findings by using the research questions as my organizational method and approach to understanding the data.

After drafting an initial version of the findings according to the research questions, I revisited the data to see if themes emerged across research questions. I deconstructed the data into categories of meaning that did not necessarily pertain directly to the research questions. Throughout this process, I returned to the survey data and interview data to make sure that ideas were not lost throughout the process of narrating the themes and findings. The processes

explained above led to an analysis that clearly demonstrates the essence of informal teacher leadership and attempts to answer the four research questions that led to this study.

## Conceptions of Informal Teacher Leadership

Teacher leaders demonstrate a particular combination of qualities that make them well suited for leading, qualities which participants typically referred to as "personal characteristics" or even "personality traits." For the purpose of this study, the term "dispositions" is sometimes used to capture these same qualities. This term aligns with recent teacher leadership literature as a way of describing the characteristics of teacher leaders (Danielson, 2006; Riveros, 2013; Hunzicker, 2017). Viewing these qualities or traits as dispositions is closely connected to scholars' and teachers' descriptions of teacher leadership as a stance rather than a job with the title of "leader" (Poekert, Alexandrou, & Shannon, 2016; Smulyan, 2016; Hunzicker, 2017). In my analysis of the data for this study, the dispositions which participants revealed through their responses to the survey and interview led me to conclude that it is necessary to view informal teacher leadership as a stance. Their leadership has no title that signifies their leadership status; informal teacher leaders inhabit a leadership stance when they are moved to act. One survey participant defined teacher leadership thusly: "Teacher leadership is a stance--meaning it is a disposition toward practice that comes with particular ideologies or beliefs. These beliefs include a focus on being intellectual, professional, and collaborative as one works toward educational equity and social justice." When describing their colleagues or themselves, participants differentiated between dispositions and the skills a teacher leader can poses. Participants described teacher leader qualities as inherent traits, attitudes or abilities that these teachers possessed. The dispositions highlighted in this section emerged from participants' conceptions and understandings of teacher leadership and more specifically informal teacher leadership.

**Conceptions of Formal Leaders versus Informal Leaders**

Participants were comfortable discussing their definitions of teacher leader, and no teachers expressed confusion when asked to define and explain the term. Their responses aligned clearly with the literature on teacher leadership and supported the findings of scholarship on the concept. The teachers interviewed had similar definitions of a formal teacher leader. All ten teachers defined formal teacher leaders similarly: Those with specific titles and/or duties outside of the typical job description of a classroom teacher in their school. All of the teachers understood formal teacher leaders to be individuals who are compensated either monetarily or through time, such as a class release or duty release. Examples provided by participants of more formal leaders included department coordinators, mentors, teaching coaches, union representatives, and leaders of committees, among others. In addition, they often described formal teacher leaders as teachers who not only had formal titles and obligations, but also approval from the administration, possibly leading to more leverage or influence with the decision makers in the school. For example, Interviewee G stated that a formal teacher leader was, "somebody that was designated as a leader perhaps by the administration…I would think that, that would be a more formal leadership position with maybe some formal power to have some leverage with the administration." This idea that formal teacher leaders need administration approval to affect change came up in several different interviews and suggests that administrators are directly involved with who is considered a formal teacher leader.

Not all teachers accepted the title "leader" as appropriate for describing informal leadership behaviors. The survey showed some participants' ambivalence towards the term "leader" to describe informal leadership behaviors. According to the 44 survey respondents who could be considered informal teacher leaders, 45% stated that they thought the term "teacher

leader" could accurately be applied to their actions as teachers. While, nearly 41% said the term was only somewhat accurate and that they would not necessarily use the term to describe themselves professionally. Finally, 9% said that they did not think the term teacher leader applied to their actions as a teacher at all. In contrast, of the 28 formal leaders who took the survey 57% felt that that the term "teacher leader" accurately described their role and 43% felt that it only somewhat described their role. One survey participant who reported engaging in informal leadership behaviors but objected to the use of the term informal teacher leadership wrote, "It [teacher leader] seems to be made of an extension of an existing concept. Leader as you defined it seems synonymous with 'highly qualified' and 'professionally licensed' teacher. It's like saying, 'Are apples healthy?' Unless they're rotting or covered in candy, they should be." This survey participant provides some insight into how teachers who engage in informal leadership behaviors may not associate their actions as those of a leader, but rather those of a well-trained teacher. The uncertainty towards the term "leader" might also support the concept of informal teacher leadership as more of a stance, rather than a title or term. While some participants did note their ambivalence towards the title "leader," they still went on to describe what they assumed would be the actions and dispositions of an informal teacher leader.

While defining and explaining informal teacher leadership, respondents described the qualities, or dispositions, that these teachers possess and the actions that they are likely to take. When describing formal leaders, they relied more on the types of positions that are associated with formal teacher leadership. They described a formal teacher leader as a known quantity, because that person's job description includes a leadership designation. In interviews, the participants used specific behaviors and personality traits to define non-positional teacher leaders, which might be because there is no clear organizational category to determine informal

teacher leadership. Because non-positional leaders are not given formal titles and are not compensated, therefore, describing the differences between formal leaders and informal leaders requires more detail.

**Experience and Credibility**

According to participants in this study, informal teacher leaders need to have both experience teaching and credibility in order to be considered a leader by their colleagues. Credibility, in this case, refers to the perception by colleagues that the teacher leader is an effective educator and an expert in their discipline. In both the survey responses and the interview responses, informal teacher leaders were described as needing to be a teacher who has been in the profession for enough years to be considered "experienced." In connection with this idea was the reoccurring concept that an informal teacher leader was not only an experienced teacher in terms of years in the classroom, but also that the teacher leader's colleagues perceived that the teacher was successful at teaching. The concept of "success" was described in multiple ways including expertise in their discipline and reaching certain groups of students.

**Years of experience.** Almost all of the participants mentioned that non-positional leaders are teachers who have sufficient years of experience, although they did not stipulate a specific number of years teaching. Even some of the participants who did personally engage in many leadership behaviors did not fully consider themselves informal teacher leaders. Interviewee F stated, "because I'm only in my third-year teaching…. I think that is the main reason why I don't think of myself that way [as an ITL]." Interviewee I commented, "I kind of think of veteran teachers, teachers who have been in the building for a while." Many others used the following terms when describing a non-positional teacher leader: "veteran," "experienced," "wise," "expert," "master teacher," and "old-timer." Interviewee J pointed out the potential link

between longevity and being an informal leader: “In my perception, a lot of times, they are teachers who are more experienced who are able to dedicate the time to taking on informal leadership roles beyond just their teaching practice.” An informal teacher leader devotes extra time to her leadership activities; an experienced teacher already has a firm understanding of her curriculum and lesson planning which could, in turn, mean that she has more time to devote to other activities such as teacher leadership.

**Perception of success and expertise.** According to participants, teacher leaders are often considered experts in their disciplines and are respected by their peers for their experience and judgment. Interviewee E, for example, described an informal teacher leader as, “a teacher whose job description doesn’t say that they have a leadership role, but who has some expertise that they want to or are able to share with their colleagues.” Interviewee F explained that these teachers, “would do something in the classroom that would demonstrate leadership.” Interviewee A stated that teacher leaders, “have thought more about pedagogy and kids. They know their craft. They know teaching better. They have thought really carefully and deliberately about why we do what we do, and they say very clearly, ‘here are our pedagogical goals that are valuable.” Interviewee A went on to explain that in his English department, the informal teacher leaders tended to be teachers with, “the literary chops, you can’t mess with them. You can’t out-read them, they understand it better than you.” Many times, the credibility of these teachers was linked to their image as understanding their discipline and being respected for their knowledge within that discipline.

A non-positional teacher leader’s success in teaching and connecting with certain groups of students provides added respect. Interviewee C stated, “maybe they’ve [ITLs] had success with certain groups of students. So, they would be someone you would ask for advice about

that." Interviewee I said that a non-positional leader might be someone who has had, "success in the classroom. If they have had a particular group of students and they've done really well with." This participant went on to explain that because of that perceived success, colleagues would be more likely to think of the teacher as a "great resource person that you could go to," thereby elevating their role to leader.

Experience and credibility are essential elements to being perceived as a legitimate leader among colleagues. Informal teacher leaders are expected to have a number of years teaching, and they are described as being teachers who are successful in their classroom, both in mastering their discipline and in being able to reach students. It was common for the participants of this study to reason that informal teacher leadership status hinges on credibility in the eyes of peers earned through teaching and subject matter mastery. Teacher leaders must be worthy of following by virtue of their expertise. However, mastering content and working well with students must be accompanied by other qualities to be considered a non-positional leader among colleagues. According to participants, informal teacher leaders also demonstrated certain dispositions that made them uniquely suited to a style of leadership that was not defined by an official hierarchy.

**Informal Teacher Leader Dispositions**

In their responses to the survey and during their interviews participants consistently used certain identifiers or personal qualities to describe and identify colleagues who they considered to be informal leaders. These identifiers were varied but some were used so often that they began to form a picture of how non-positional leaders could be recognized within a school community. These character traits and qualities were not described as skills, but rather as inherent ways of being and interacting with their colleagues: passionate, right-minded, bold, and

inviting. The dispositions listed were mentioned multiple times by a majority of the participants in both the survey and the interviews. What follows is a description of each disposition that emerged from the data, thereby illuminating the qualities that informal teacher leaders demonstrate and bring to their leadership stance.

**Passion.** One identifier or quality mentioned in almost every interview is that non-positional leaders are teachers who are very passionate about the ideas and issues that stir their interest in leading. Interviewee D reported that for some teachers, their passion comes from their subject area: "A lot of times our content is a cause for us. We really care passionately about science topics or history or poetry." Sometimes the interviewees described the same sentiment as "passion," using other words such as "spark." Interviewee E stated, "I would say someone that has a spark and gets others very excited about learning." In this example, the interviewee is identifying passion as the reason people in the school community are willing to follow the educator. Sometimes the passion that these teachers exhibit was attributed to being the motivation for leading. Interviewee D explained that, "they are moved because they are passionate to do what they are doing, and they have a drive." Interviewee G echoed this sentiment: "Recognizing that there's something that motivates them, and they are pretty passionate about it and talk to others about it."

Interviewee D, while responding to a question about where she learned to be a leader, explained that being a part of the Girl Scouts of America organization helped her to understand that it was necessary to, "find something that you're passionate about, that's important. Can't be a good leader unless you have something that you're passionate about." This captures the ideas that many of the participants proposed across the interviews in regard to informal teacher leaders. According to participants, a non-positional leader's dedication and excitement for

certain topics creates a drive to lead on issues that matter to them. In addition, this passion can be the catalyst for others following the teacher, making this disposition important for informal teacher leaders to possess.

**Right-minded**. Participants noted that informal leaders were teachers who were honest and trustworthy. Informal leaders were considered right-minded and had beliefs and opinions that were acceptable and worthy of their colleagues' trust. Interviewee B remarked that these informal leaders attract followers because, "people are drawn to these people because they feel like they can be trusted." Interviewee G explained that in comparison with a formal teacher leader or administrator, a non-positional leader is different because the informal nature of their leadership, "allow[s] people to approach that person and trust that person in a different way [than an FTL]. The relationship would be different. The level of trust…I think that is probably a key [to an ITL's success]." Several teachers being interviewed expressed the opinion that to be an informal leader, "people need to trust you."

Colleagues place their trust in an informal teacher leader because these leaders are perceived to have beliefs or values that are respected. Participant C mentioned that teacher leaders are trusted because of their sincere beliefs that are rooted in wanting to help students and their community, rather than simply trying to "ladder-climb" into administrative roles. Interviewee G gave a specific example of a teacher who was a "go-to" for colleagues about things that were even beyond teaching. She reported that her colleagues would come to her to talk about their family lives and personal business. This example clearly shows a marked level of respect in the teacher and her opinions, going beyond work-related issues. The trust that colleagues place in informal teacher leaders shows that respect from their peers is likely a foundation for their leadership. Participant D pointed out that informal teacher leaders "have a sort of cause" that

attracts their colleagues and other community members. Participant E believed that this respect was also built on their commitment to helping others express their ideas. She claimed that informal teacher leaders were able to, "bringing a voice to those whose voices may not have been heard as much as the majority of the school." They are not only considered right-minded for their own beliefs and ideas, but informal teacher leaders also value the voices and ideas of others in their community.

Perhaps even more illuminating is an example from Interviewee A who described a "self-appointed" informal teacher leader who did not have the respect of his colleagues and therefore did not deserve to be considered a teacher leader. Although the teacher in question believed he had gained status as an unofficial leader among his peers, his departmental colleagues, however, did not concur with his self-designation as a leader. In this case, it is the lack of respect from his peers that made it impossible to be considered a non-positional leader because the teacher in question seemed to be acting out of self-interest. According to Interviewee A, the beliefs and opinions of his colleague were not respected by his fellow teachers. Interviewee A's colleague likely demonstrated some leadership behaviors, but without trust from those teachers around him, there was a hesitation to follow his leadership. This example offers a contrasting lens which still supports the claim that non-positional leaders benefit and draw some leadership potential because their colleagues have confidence in them and respect their ideas, a disposition I have labeled being "right-minded".

**Bold**. Across their responses to the questions, there was a picture created of a teacher who was not afraid to speak up in public when they believed someone should bring attention to a certain problem or issue. This boldness was described in many ways including "bravery," "courage," and "risk-taking." The essence of this boldness is that informal teacher leaders tend

to be the teachers who are willing to place themselves in front of an issue, even if there are risks in speaking up and speaking out. Interviewee G said that an informal teacher leader, "is cooperative but also I think a little bit courageous…because if you're willing to stick your neck out or you're engaged in something that's important that you should speak out on, you're going to need courage to do that and you're going to need bravery to take a risk…people might not like it or be upset with you." Interviewee E used an example of a colleague who helped students put up posters that brought attention to the plight of marginalized groups within the school, which the administration actively discouraged; yet, the teacher did not waver from her belief that it was the right thing to do regardless of the possible consequences.

In reflecting on their own actions, the teachers who were interviewed described themselves and their behaviors as having a bold quality. Interviewee H said, "I tend to speak up if I see something that bothers me, and people seem to count on me doing that." They also reported being thanked on more than one occasion for being the teacher willing to speak up when no one else could or would. Interviewee E remarked, "I feel like I'm a risk-taker." This was after describing an environment in which risk-taking was actively discouraged by her administration. It should be noted that this particular teacher did not have professional status, which is a form of tenure for Massachusetts teachers. This lack of professional status adds a layer to her risk-taking because her job was not secured through a tenured position. Interviewee G, who had been teaching for over 10 years reflected on her own boldness and risk-taking behaviors: "I guess I'm subversive in a lot of ways. You have to create a little chaos to draw people's attention to the wrongness and fight a little bit even thought it would be easier to just go along." She identified her behavior as almost tactical in order to draw attention to certain issues or problems.

In these examples, interview participants described informal teacher leaders as teachers who speak out in public spaces and bring attention to issues that matter to them and their communities. They question the status quo and use their boldness as a leadership tool. When teacher leaders are acting courageously, they build the respect of their colleagues who see their actions as necessary and desirable and that add to the perception that they are right-minded. Non-positional leaders who speak out in public spaces might not be well received by everyone in the school community, making their actions carry even more weight because it is seen as courageous or "risky" in service of a worthy cause. Their bold dispositions contribute to their leadership stance and to their ability to influence decision-making at their schools.

**Inviting.** According to participants in this study, teachers who were considered leaders tended to be open and inviting to their colleagues. Their accounts suggest that non-positional leaders make their colleagues feel like they have an open door and are willing to listen and problem solve. They develop relationships with their colleagues that are founded in trust and in a sense that the informal teacher leader is interested in what other teachers are thinking about. Interviewee A told the story of his colleague who was a formal teacher leader and who was struggling with being taken seriously by the administration. This formal teacher leader sought out advice from the informal teacher leader because, "it's super lonely and often there are teachers [ITLs] who sort of play the role of, if not lieutenant, but counselor, right? You come in and you're like, yeah, that sucks man, let's help you solve this problem. Let's talk our way through this." In this example Interviewee A acted as the trusted confidant who was open to listening and helping the formal leader problem solve.

Interviewee B explained that one of the informal leaders in his school was well liked and respected partially because he made it a point to form social relationships both in and out of

school. By interacting with colleagues in both a formal and informal setting, he showed his willingness, "to listen, to have an open door, and be willing to talk to you." Interviewee J described informal leaders as teachers who, "invite people in, talk about it, initiate dialogue…just inviting people." The repetition of the word "invite" seems to signal an opening and willingness to initiate conversations and to listen to others. Finally, interviewee H described the skills necessary for an informal teacher leader and she concluded that they needed to have, "good listening skills…I guess friendliness, if you want to get something done or you want to help, I think you have to be…approachable and flexible." While the study participants describe the necessary quality of being inviting in different ways, it is clearly one disposition of a non-positional teacher leader. They are teachers who are welcoming and engaging. They enjoy talking with their colleagues and listening to their ideas, which in turn attracts colleagues to them, hence making them informal leaders. This quality is also essential to their ability to build strong relationships with people in the school community, which is one of the main modes that informal teacher leaders exercise their leadership and is discussed later in this chapter.

The data from surveys and interviews clearly demonstrate that in addition to being experienced and credible in the eyes of their colleagues, there are several dispositions that informal teacher leaders exhibit in order to lead in their schools. Throughout the course of this study, informal teacher leaders were described as being passionate, right-minded, bold and inviting to their colleagues, qualities that help colleagues identify teachers as having the potential to be considered leaders. The combination of some, if not all, of these traits were considered essential for non-positional leaders, and the passion that a teacher brings to a certain issue inspires colleagues to listen and sometimes follow them. Informal teacher leaders engage and encourage colleagues to collaborate with them; this openness likely helps build trusting

relationship between the teacher and their colleagues. Informal teacher leaders are influential because of these trusting relationships and their colleague respect and admire their ideas. Finally, colleagues respect these informal leaders because they are willing to speak up publicly in defense of their ideas and they are willing to take risks in order to achieve their goals. It is possible that all of these traits make them worthy of their leadership status in the eyes of their colleagues. Once teachers move from speaking about issues that matter to them to acting on these issues, they begin to occupy a leadership stance. They use their leadership stance in a way that has the power to influence decision-making in their school. The dispositions explored in section one explains the mindset of an informal teacher leader; what follows will identify what actions teacher leaders take that move them from simply having teacher leader dispositions to being considered leaders within their communities.

**Finding One: Status as an informal teacher leader stems from being adept as an educator and from the enactment of dispositions, not from the attainment of a credential or formal authorization.**

An informal teacher leader is someone that colleagues respect, a perception that they are educators who have committed time to the teaching profession and they are well regarded for their ability to teach. Their content area knowledge is indisputable. These teachers have certain combinations of qualities that make them appealing as leaders including passion, right-minded, boldness and their openness with colleagues. Informal teacher leaders are respected and trusted by their colleagues and are perceived to have acquired their leadership status by demonstrating their skills as teachers and leaders, rather than relying on a formal title. These educators are willing to go public about their ideas and beliefs. These qualities help them to initiate change in their school communities and even in the teaching profession at large.

## From Dispositions to Action: Informal Teacher Leaders as Problem-Solvers

Teacher leaders use their experience and a combination of unique qualities to move their goals and ideas forward beyond private conversations with colleagues and other community members. Data from this study indicate that teacher leaders are overwhelmingly educators who are problem-solvers; they take action to solve problems. Their ability to identify problems contributes to their leadership stance and positions them to act when they are moved to do so.

### Initiating Action

Informal teacher leaders are not only passionate, right-minded, bold and inviting, but according to interviews and survey responses, they are also action-oriented. Teachers who are considered leaders are able to set goals and initiate actions that help them to achieve their goals. This conceptualization of informal teacher leadership moves the teacher from thinking and talking about an idea to initiating actions that might improve their schools and influence decision-making.

The teachers surveyed and interviewed used terms like "initiate," "active," and "start" to describe teacher leader behaviors. Responses from the survey included a teacher working with parents to "start" a gay/straight alliance for the middle school, a teacher "starting" instructional rounds to show colleagues how they worked, and "starting" an ultimate frisbee team for the school without any resources from the administration. In these examples, the teacher leader is the person creating or executing the plan of action to begin a new idea. For example, Interviewee G said that informal leaders should be able to, "initiate things, I would say take the initiative…somebody who would start a dialogue with other teachers rather than wait for one to start." Interviewee D used very similar language saying that a non-positional leader, "initiates dialogue a lot about the issues and concerns, whether it's students, staff, administrators, whatever

issues in the school, school issues. [An ITL is] somebody who would most often initiate those conversations." One survey respondent described, "taking initiative for starting an AP science program" at their school. Interviewee B mentioned that ITLs tend to be teachers who actively work to find out what others in their school think and why in order to understand the complexities of a problem. These teacher leaders do not always wait to be asked to lead; instead, they take the initiative to figure out how to solve a problem or help others. For example, Interviewee F posited that informal teacher leaders were the educators who volunteered to lead committees, rather than waiting to be asked. They see the potential in making positive changes and are willing to start the process, even without compensation or formal recognition.

Two more examples further illustrate the idea that informal teacher leaders are initiators of action in their schools. One example was from Interviewee A who described a colleague that he considered a teacher leader. He described her as someone who never complains and who does not really see anything at the school as an insurmountable problem. She is determined to find a solution and will move from a conversation at lunch about broken copiers to having worked through some possible solutions within a few days. In another example, Interviewee I was explaining the possible impediments to informal teacher leadership and she mentioned that never having enough time was one the biggest barriers of leading without extra time or compensation. She followed that comment by mentioning that she often initiated collaboration time with her colleagues outside of the regular schedule. In both of these examples, it's clear that teacher leaders are motivated to take action and are willing to be the ones who start the work of achieving their goals, rather than waiting for someone else to tell them to get started.

While they may not have a formal leadership title, when these non-positional leaders want to accomplish a task they take the initiative to work on that task. They are not content with

simply talking about problems that they and other members of their community might face. Teacher leaders believe in their own ability to solve problems and initiate changes in their school. They are action-oriented teachers, which distinguishes them among their peers. They not only identify problems, but they move to solve those problems. The problems that informal teacher leaders identify as worthy of their leadership are incredibly diverse.

**Identifying Local and Global Problems**

Across the data there were many indications that teachers who lead outside of the school hierarchy are understood to be motivated to solve problems within their schools and communities. This motivation propels the teacher to move from thinking and speaking to others about something they see as an issue that needs to be addressed to initiating action to solve the problem. Teachers reported many motivations for deciding to take on a leadership stance in their survey responses, including: to improve their teaching, to invest in their school community, and to address problems that they felt were not being addressed. Interestingly, many written responses to a survey item inquiring about how participants defined teacher leader could be paraphrased as someone who could identify a need and who acted to fill the need. When asked to describe their motivations in the interview, most teachers focused on the third motivation of problem-solving. In both the survey and interviews, non-positional teachers focused on problems that ranged from curricular issues within a specific subject area to large-scale problems such as helping stop global climate change. Informal teacher leaders are very likely to act when they identify problems that impact their students or colleagues negatively.

In order to understand this emerging phenomenon, problems mentioned by participants were divided into two categories: local problems and global problems. For the purposes of this study, local problems are problems that are specific to the school community in which the

teacher works. These are problems that are somewhat unique to the school and that the teacher specifically wanted to address in their own, local community. Many times, local problems are more technical in nature and they are focused on fixing a problem that will result in more effective teaching in the immediate future. Global problems are problems that the teacher perceived to be impacting more than just their local community and the solutions that the teacher sought were intended to reach beyond the local community. Solutions to global problems might have started within the local community, but the motivation to solve the problem was clearly noted by the teacher as wanting to make an impact beyond their school community. In addition, global problems tended to be more complex and require more global, or multiple, solutions. Teacher leaders were to be able to identify and define a local or global problem and then initiate action steps to address them.

**Local problems.** Survey and interview participants demonstrated a range of local problems that they identified as needing attention. Many of these were issues that were specific to the teacher and their specific context. For example, some respondents were focused on solving problems that involved their colleagues such as creating a more equitable school schedule for all departments, improving the co-teaching model at their school and improving impersonal relationships and inconsistent practices between special education support professionals and classroom teachers. These three examples demonstrate a desire for a more efficient and equitable work environment for teachers. These are technical problems that potentially prevent teachers from being effective. Other local problems that appeared in survey responses included convincing teachers across the humanities subjects to use similar vocabulary when teaching students and bringing more effective use of technology into classrooms. Terms like “effective” and “efficient” appeared multiple times in survey responses describing local

problems. These terms suggest that the teacher leader's motivation behind solving these problems was primarily to create a more productive teaching environment in their schools and improve teaching for their students.

The local problems discussed in interview responses provided an opportunity for more details about the teachers' motivations to solve local problems. For example, Participant J was particularly frustrated with the way in which the science department organized and catalogued the materials needed for student lab work. After discussing with colleagues and confirming that the current system was inefficient and unhelpful, Participant J initiated a process of figuring out a better system that would work for the entire department. Participant I noticed that her team meetings were not as productive as they could have been because there was no formal leader and no protocols for accomplishing the agenda. With support from her team, she volunteered to help facilitate the meetings by researching some protocols and creating potential agendas before each meeting. Participant B noticed that the school was creating more co-taught special education classes but was not devoting the necessary resources that would be needed to make the model work effectively. He was moved to meet with the superintendent who was new to the district to help her understand the problem as it was playing out in classes. He felt that most of the upper administration saw the increase in co-taught classes as a move that showed a commitment to students, while teachers who were actually teaching the co-taught classes were not able to do so effectively because of a lack of support and training. These are problems that have potentially attainable solutions and that would directly benefit the teacher, their colleagues and the students in their school community.

Local problems directly impacted the teacher, their specific colleagues, and/or students. By tackling these issues, an informal teacher leader and/or a member of their school

community would directly benefit from the result. In the examples provided by both the survey and interview participants, the resolution of these problems would make the teacher leader's teaching more efficient, effective or more satisfying in the immediate future. In some sense, these local problems had identifiable solutions which could be achieved and accomplished. In addition, solutions were immediately felt by other members of the school community. When a teacher took action to solve problems at a local level, the teacher was characterized by their colleagues or by themselves as acting as teacher leaders.

**Global problems.** While local problems have an immediate, direct impact on the school community and the informal leader, in some cases problems that informal teacher leaders chose to pursue are symptoms of larger, global issues that the teacher believes is of great importance. In the case of global problems, the teachers interviewed specifically mentioned the desire to make a long-term impact on an issue that was not confined to their specific school community. In this case, global represents both impact outside of the local community and problems that often required more complex solutions. Issues that were touched upon by teachers included racism, sexism, and ethnic and religious biases. These were problems in which the educator specifically mentioned the desire to affect change in their students and community to address a larger societal problem and in many cases, these were also problems that could be considered local manifestations of global problems.

Survey participants rarely offered a sufficient amount of detail to demonstrate clearly the difference between a local and global problem. Some of the problems recorded by survey participants pointed to the possibility of a teacher wanting to influence a global problem. For example, one participant noted that they helped a student group change the graduation gowns to be gender neutral. The problem seems local in nature, as the solution would only impact the

seniors at this teacher leader's specific school; however, the idea of making graduation gowns gender neutral might also point to a desire to address a more global issue such as sexism. Again, it was very difficult to understand the underlying motivations for many of the written responses of survey participants, but that should not stand as evidence that some of the problems they listed were not global in nature, but rather, it was not possible to clearly attribute a more global meaning to their documented problems.

Interview participants provided more nuanced perspectives on problem-solving because of their ability to fully describe the phenomenon. The following examples demonstrate a pattern of teacher leaders identifying an issue that they want to solve that seems local on the surface but that ultimately has much more global implications and motivations. Participant A gave an example of acting as a non-positional leader when he pushed his department to make a curricular shift which, on the surface, seemed like a local problem. The English department at his school was assigning a novel for summer reading that touched on issues of race in a historical context. The novel in question used racially charged language and included characters that stereotyped black Americans. Without the proper historical context, the book could easily be misinterpreted by students. While this particular English teacher did not teach the curriculum that was associated with this book, he felt compelled to raise the issue with his colleagues in the department, because he asserted that, "we're doing something wrong, it's wrong, and what we're doing is racist. It discourages black kids from feeling comfortable in a class [honors level English] that we're trying to get more black kids into." In addition to his feeling that this practice was unfair to black students, he also talked about wanting to help white students talk about race and understand how to discuss these sorts of topics, which are outside of their experience in high school classes. He explained that the book needed to be taught during the

school year when the teacher could provide a safe space for all of the students to tackle the difficult topic of race: "it gives kids a safer space to talk through race and frankly it needs to be safe because there are a lot of white kids [in the school] and they don't really know how to do it [discuss race] and we need to help them." In this example, Participant A saw a local problem through a global lens. He believed that a curricular choice was a symptom of the larger issue of racism within his school and society as a whole. He was motivated to act so that the teachers in his department would help students understand how to approach difficult topics such as race and racism that would serve them beyond the classroom. This example included a second motivation, the teacher's interest in making honors level classes more appealing to black students, who were not proportionally represented in higher level classes. This is a global problem that also factored into Participant A's motivation to make the course more accessible to students of color. Changing the summer reading, "hopefully opens [honors level courses] up to some kids [specifically black students]." Participant A wanted to address the larger issues of racism and the opportunity gap in order to help students thrive even beyond their time in high school.

Participant C's bold disposition moved from simply speaking about a problem in a private setting to acting in a very public setting to solve the problem. The problem was local in that it focused on the behavior of an administrator who was known for treating female subordinates in ways that demeaned them. She did not approve of the way this administrator treated female employees and other teachers had approached her about their experiences with this administrator. Interviewee C reported that her female colleagues did not speak up and bring attention to the issue because they were too afraid to cause more problems. This is what prompted them to ask her if she would bring their concerns to the school committee in a very public setting. No other teacher was willing to speak at this meeting, but Participant C explained

her motivation to do so as, "when I feel a group is being particularly discriminated against, and in this case, it was female teachers, that indicates to me that there's a culture in the entire community of the school and that [female] students must be feeling that also." Participant C's motivations in this example are clearly equity and fairness. She identified sexism in this case as the reason that she was willing to speak out against an administrator in a public setting. She also believed that the incident was something that was possibly impacting female students through a cultural acceptance of sexism. This sentiment exemplifies the teacher's desire to take action in order to combat sexism and a culture of sexism that is pervasive beyond the single incident she acted on. At a later point in the interview, this same participant returned to my question about motivations and explained that she could not possibly ignore situations where injustice was happening because it would be morally wrong to not take action. This desire to promote social justice is something that stood out in the examples of teachers wanting to tackle problems through a global lens.

Participant D offered another example of this type of motivation to positively impact a global problem. She explained, "the things that motivate me are the big picture ones and then I kind of chip away at them." She, like participant C, was motivated to actively address, "issues with gender equality and that definitely is more of a hot button issue in the community." In providing an in-depth example of trying to tackle a "big picture" problem, Participant D referred to her desire to teach students and the school community about sustainable practices that will help slow climate change. In order to do this, she collaborated with the environmental club at her school and she constructed a working beehive in her classroom to teach students about one small aspect of a much larger issue. As she put it, "understanding where their food comes from is a huge part of the goal of seeing sustainability as important." Her beehive project subsequently

led to other science teachers using the hive in their own lessons which spread well beyond her own students. In addition, the teacher who was running the environmental club asked that Participant D help them run the club because of her success with the beehive. She mentioned that the success of such a huge project made the students in the environmental club excited about the possibility of doing much larger scale project such as hers. Like the other examples provided, participant D saw her local problems as specific symptoms of global climate change and she was motivated to act as a leader in order to address those global problems at a more local level.

Participant F expressed a desire to curb Islamophobia in her school community because of the unfriendly climate in the country towards people perceived to be Muslim. She wanted to use her unique position as an Arabic teacher to combat bias against Arabic speaking people. She helped students come up with a plan to teach the student body about biased language against Arabic peoples. She spoke specifically to her students in Arabic classes about, "our role [students and herself] as Arabic learners in the U.S." in combating bias and hurtful language around Arabic cultures. While she tackled her local problem, she also presented her lessons on biased language at regional and international conferences, demonstrating a desire to reduce Islamophobia beyond her school community. Similarly, Participant H made a new curriculum in her geography course because of the discrimination and racist language she heard students using in her school. Like Participant A, she explained that many white students did not know how to talk about race and racism and teachers needed to provide them with the tools and language to be able to explore that topic and to prevent racist and biased behaviors from forming. Not only did she work to change her own curriculum, but she also organized a regional conference in order to teach teachers outside of her school, demonstrating a more global motivation. She described her

goals as, “I think they [students] will be able to function better in life. I think that it’s important just for civil discourse and being an informed citizen in the US at this point.” Here she clearly outlines her desire to make her students become better citizens of the country, not only more knowledgeable in geography concepts.

Informal teacher leaders self-reported doing a lot in their schools, and as the first section of this chapter demonstrates, these teachers have a unique set of dispositions that make them well suited to occupying a leadership stance. A close examination of the data shows that their leadership stance pushes their dispositions from behaviors and characteristics to using them in service of problem-solving for a variety of issues. Teacher leaders sometimes focus their efforts on problems within their specific context with the goal of making their teaching more effective. Another pattern emerged of informal teacher leaders solving local problems through a more global lens with a focus on social justice. Being that informal teacher leaders are action-oriented and adept at problem-solving without the help of formal power structures, it is essential to understand how these teachers go about identifying and solving problems. They use their strong relationships with community members to leverage their power and influence to initiate change within their schools and employ a variety of strategies to achieve their goals. How these non-positional leaders exercise their leadership is the subject of the next section in this chapter.

**Finding Two: Non-positional teacher leaders are action-oriented and attain their status as a leader by demonstrating their ability to identify and address a wide-range of problems.**

According to the participants in this study, teachers who gained their unofficial status as “leader” were educators who initiated action and problem-solving within their schools and their wider communities. The problems the teachers chose to tackle were varied but mostly focused on local issues within their schools that needed attention. While all of the problems that informal teacher leaders shared were local, some of those same problems were also connected to a desire

to bring attention to a larger issue impacting society such as encouraging anti-racism, feminist ideals, and combating climate change. While it is possible that all local problems shared were rooted in an attitude of fixing more global problems, some teachers expressly mentioned the desire to have an impact on larger scale problems beyond their own schools. Some teacher leaders specifically regarded their work as serving a larger purpose that reached outside of their schools into a more global environment. Their commitment to addressing social justice issues demonstrated that informal teacher leaders often have the desire to impact their larger society.

## Exercising Informal Teacher Leadership

Nearly every survey and interview participant indicated the need for non-positional teacher leaders to work with colleagues, students and other school community members to exercise their leadership potential. In fact, participants identified relationship building and collaboration as the most significant way that these teachers exercised their leadership. The data showed that informal teacher leaders are community-oriented with a strong desire to be active contributors to their school communities. The responses of participants illuminated a distinct pattern of exercising their leadership and influence by leveraging their strong relationships with members of their community. Once the potential for adopting a leadership stance was established, the teacher leader discovered a problem that motivated them to lead. This led to the non-positional teacher leader identifying colleagues, including fellow teachers and formal leaders, and sometimes, students to discuss and confer with in order to figure out a possible solution to the problem. Following this collaboration, the teacher worked with others to execute some kind of action to address the problem. In the process of working with others to find solutions to the problems they identified, these informal teacher leaders began to widen the circle of their influence and leadership.

According to the data collected, before a teacher began the process of exercising their informal leadership they first positioned themselves as leaders by adopting what I identify as a leadership stance. There are certain elements that allow the teacher to be able to step into their leadership role or stance. Previous parts of this chapter established the dispositions necessary for teachers to have in order to be recognized by colleagues as leaders. These dispositions included being right-minded, passionate, bold and inviting. Data from this study also showed that informal teacher leaders have the ability to identify and define problems that range from local issues to more global issues of social justice. In addition to these two elements, participants claimed that informal teacher leaders demonstrated an appreciation for collaboration and the desire make a positive impact in their larger community. These four elements seem critical in positioning a teacher to potentially step into their informal leadership role. Once they are motivated to fully inhabit a leadership stance they can begin the process of articulating their actions as a leader.

**Desire and Appreciation for Collaboration**

As mentioned in the previous sections, informal teacher leaders possess a disposition which invites their colleagues to collaborate with them. According to the teachers being interviewed, teacher leaders, "collaborate with others, work with others." Interviewee F said that non-positional leaders, "take time to collaborate with their colleagues and to share with their colleagues." Interviewee B stated that these teachers enjoyed "bouncing ideas off of colleagues" and that they were "people who are talking with everyone." A common sentiment expressed was that these teachers were "willing to share their information," as Interviewee I claimed. Interviewee I said that she noticed that "people often seek me out to ask me questions about

things." Informal teacher leaders welcome and desire an open and productive relationship with their colleagues.

Interviewee D described an example of working with her science colleagues when she noticed that students were scoring lower than desired on the short answer portion of the state mandated science test. This prompted her to seek out colleagues in the humanities departments to see what strategies they employed when teaching short answer responses. From there, she invited these teachers to meet with her colleagues in the science department to collaborate on discovering better methods for teaching students to construct short answer responses for assessment items related to science. This example demonstrates a willingness to collaborate with more than just departmental colleagues; she initiated collaboration between departments.

Three of the interview participants specifically mentioned that they were motivated to act as leaders by the prospect of achieving collaborative relationships with their colleagues. Interviewee F explained that it was her primary motivating factor, because she felt that being an informal teacher leader allowed her to have strong collaborative relationships with her colleagues. It is clear that for all of the teachers who were interviewed, collaboration was an integral part of teacher leadership.

This theme, reflected in the leadership literature, suggests that a reciprocal relationship exists between informal teacher leaders and their colleagues. Colleagues seek out teacher leaders for their expertise and support and the leaders benefit from these collegial and collaborative relationships. Because non-positional leaders enjoy these relationships with their colleagues and find them fulfilling, it then gives them the urge to collaborate more, which creates goodwill and trust between themselves and their peers. This is a beneficial cycle for both the informal teacher leader and their colleagues. These positive relationships also build a strong foundation for

teacher leaders to be able to influence their colleagues which provides them with a form of power that is derived from trust rather than formal positionality.

**Community Oriented**

Informal teacher leaders are set apart from other classroom teachers by their desire to bring their knowledge and skills beyond their classrooms and positively impact their communities. Many participants suggested that there are many "good" classroom teachers who simply do not have a drive or motivation to bring their skills outside of the classroom to the wider school community, which limits their potential to influence school-wide decision-making. Wanting to engage with the school community is a distinctive quality of an informal teacher leader. In some cases, this means trying new ideas and sharing those ideas with more than just the students within their classes. Interviewee E believed that informal teacher leaders valued, "community in general…not just keeping it between teacher and student." Interviewee G described a teacher leader as, "Somebody who's basically just concerned about other people, just a nice person. Someone who feels community among staff." This orientation towards the community is not just for colleagues, as Interviewee H pointed out, "bleeding out of the classroom could be for things that you want students to pursue in the greater world." For these teachers there is both the desire to make teaching less private and also to encourage their students to see the greater purpose of their learning outside of the classroom, an idea directly connected to their global perspective mentioned earlier. Non-positional teacher leaders understand that they benefit from working closely with fellow teachers which motivates them to reduce the isolation that is often present for classroom teachers. Their desire to work outside of the classroom is perceived as a benefit of informal teacher leadership.

Data from this study pointed to the perception that teacher leaders offered many benefits to their school communities and that the positive impact of their leadership was a powerful incentive for teachers to occupy a leadership stance. Teachers who participated in this study asserted that most people in the school community benefited from teacher leadership including students, colleagues and the informal teacher leaders themselves.

**Student community.** Most of the problems that teacher leaders try to address or solve are geared to improving their teaching in order to help the student population. It is not surprising that the participants interviewed mentioned the potential benefits of teacher leadership behaviors for the student community. Participant E simply stated that informal teacher leadership can lead directly to, "students engaged and enjoying learning." Participant D reported that, "you never know when something that you're passionate about is something that a student would also be passionate about and they just haven't realized it yet…so opening up opportunities for students is definitely a positive thing." Participant H confirmed this belief that non-positional leadership benefitted students because, "it can make the students' experience better."

Participant C thought that teachers who take on non-positional leadership act as role models for students: "it's important for them [students] to see that there are people who simply do what they think is right or stand up for things, not [just] to be recognized." She went on to describe her role as a history teacher to explain that when society is too focused on the accomplishments of one formal leader, it becomes easy to forget that there are lots of people behind that leader who are informally helping to achieve a larger goal. Participant B shared a similar sentiment believing that these teachers have the potential to, "take students along with [them]" and inspire the students to take on their own leadership roles. It is clear that these teacher

leaders emphasized that students benefit positively from informal teacher leadership and that student motivate teachers to act as leaders.

**Colleagues and school culture**. Participants felt that their contributions as leaders also positively impacted their colleagues and the general school culture. Several participants expressed an impression that their work as leaders had the potential to promote similar behaviors in their colleagues. They also felt that having informal teacher leaders within their school improved the professional culture because of the amount of collaboration and relationship-building that these teachers generate. Participant I remarked that her colleagues, outside of her department, noticed the benefits of having teachers who lead within their department, "[ITL behaviors] are productive. There are so many teachers at this school that are like, 'wow you guys are in such a great department. You're so productive'." Participant G pointed out that the positive attention is not just from colleagues, but sometimes the wider community. When a teacher leader is successful it reflects well on the greater school and, "give[s] PR to the school, that's a positive. I think you might be able to leverage that good reputation to get more resources or to create new things and propose new ideas."

Many of the study participants indicated that informal teacher leaders often inspired other teachers to take on similar roles. Participant B observed that, "passion is infectious…it definitely drags people [teachers] along…it's infectious for the culture…when you see this person [an informal teacher leader] is able to do this and still feel supported and does a lot and is a valued member of the community." Similarly, Participant E mentioned, "that when other teachers maybe witness that or hear about it or decide to try it and then it works…then there's a kind of ripple effect. That can be positive." Participant D remembered her own experience of watching a fellow teacher lead, which inspired her to do something similar the following year, "When you

have a positive experience with this kind of thing [ITL] it kind of also motivates others too. I saw my colleague present at that conference the year before and so I was like, oh, that's something we can do. Maybe I should do it too." When non-positional leaders achieve success and are able to demonstrate that their time and effort paid off, other teachers are inspired by their work. This can not only motivate individual teachers to take on leadership roles, but it can also create a culture within a school that teacher leadership is valued and useful for the school community.

**Informal teacher leaders**. Teachers reported that they personally experienced benefits from their active role as teacher leaders. Participant B felt that he was respected and valued as a member of his school community because of his actions as an informal teacher leader. Participant F posited that an informal teacher leader is someone who is more fulfilled in their job because they are engaged in interesting problems that go beyond their own classrooms. She paraphrased a colleague who helped her with a project, and whom she considers a leader, as saying, "well, I've been here so long, I have to do extra things to keep this job interesting." Participant I's perception was that her non-positional leadership role, "gives me confidence that people believe in me and trust me and are supportive of me in that role. Then it encourages me to want to do more of it." Participant A asserted that being an informal teacher leader lessened the feeling of isolation that many teachers experience. He went on to explain that, "it has been a way to remember I'm in this community…for real and in a meaningful way." Participant G expressed a feeling of empowerment because of her previous successes as a leader, "I feel more powerful. I feel like I can leverage a little more power or influence more in the school." Each of the teachers all reported a feeling that their role as leaders was beneficial to their careers because

it made their job feel more fulfilling, interesting and made them feel more agency within their schools.

**Adopting an Informal Teacher Leadership Stance**

Non-positional leaders appreciate their role within their larger school communities. They believe in the power of collaborating with community members, especially their colleagues. Participants in this study expressed a desire to bring their knowledge and skills outside of their classroom. They also believed that their participation in the community directly benefitted themselves and other community members. This commitment to collaboration and community are key to understanding how teacher leaders exercise their leadership and exert influence in their schools. A combination of four key elements create the conditions for a teacher to claim their informal leadership stance. These elements, illustrated in Figure One, include their commitment to collaboration and to positively impacting their community, combined with their unique dispositions and ability to identify local and global problems, explained earlier in this chapter. Their commitment to building collaborative relationships is not only an element of their leadership identity, but it is also a tool that can they employ to accomplish their goals and exert influence in their communities.


Figure 1: *Elements necessary for a teacher to potentially occupy a leadership stance*

**Expanding Spheres of Influence Through Collaborative Relationships**

Once a teacher is positioned to adopt an informal leadership stance they are more able to successfully exercise their leadership. A pattern that emerged from the data is how participating teacher leaders exercised their power by utilizing collaboration as a leadership tool. An informal teacher leader does not have the backing of a formal power structure to make binding decisions; however, they do have the ability to powerfully influence their school communities including those with the formal power. Teachers with the potential to occupy an informal leadership stance are more likely to identify a problem that has the potential to help many members of their community. Their discussions and interactions with colleagues, students and other community

members help expose them to multiple perspectives and potential problems that could be addressed. In addition to exposing them to many perspectives, their collaborative relationships build trust in their judgement and increases their support from community members.

Participants described informal teacher leaders engaging in actions that relied on community members and strong collaborative relationships to expand their influence. If the teacher is moved to adopt an informal leadership role, they almost always used their collaborative relationships to gradually expand their sphere of influence within their communities to help make a positive change. After identifying the problem, every teacher leader interviewed strategically chose people in their schools and communities to collaborate with in order to create and achieve a solution to the problem. This collaboration often started with a smaller group of trusted colleagues and often moved to include other stakeholders. The power that teachers wield as leaders is entirely through their shared approach to leadership. Teacher leaders rely on their strong collegial relationships to enact their leadership. According to participants, after identifying a group of people who could help them, they made a plan in conjunction with other members of their community and took action to address the problem. Figure Two demonstrates the factors that sometimes contribute to an informal teacher leader's ability to exert their influence and power to lead in their schools.

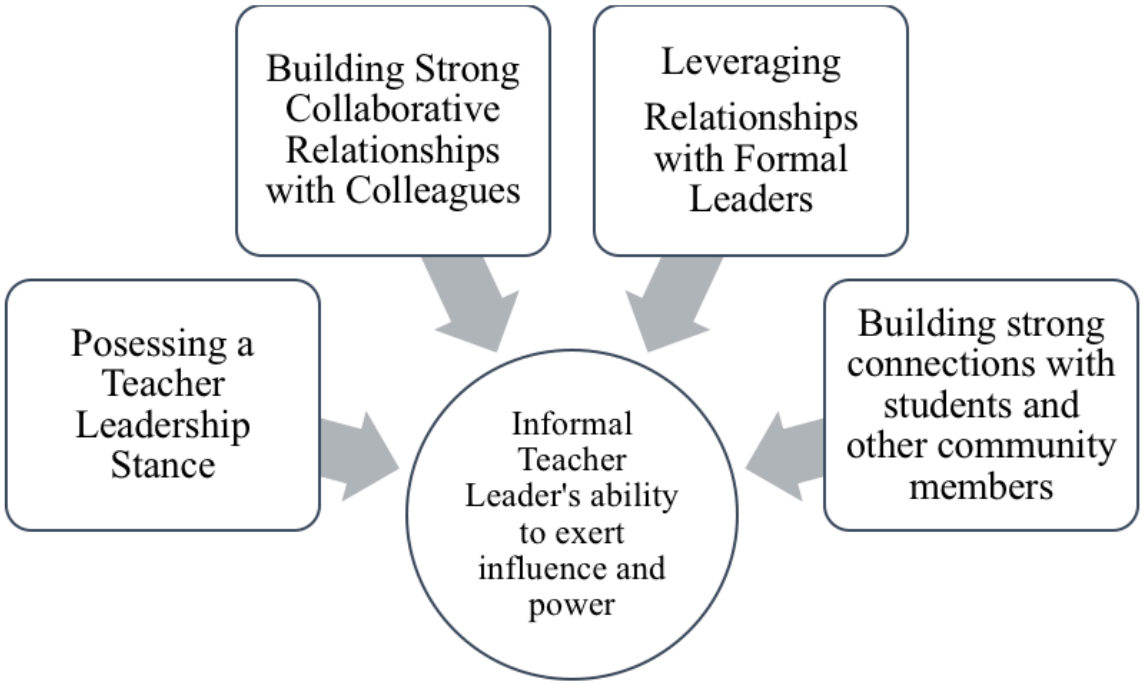


Figure 2*: Possible factors contributing to an informal teacher leader's ability to exert influence and power in their school.*

**Leveraging Relationships to Enact Change**

In order to exert influence and power within their schools, most of the participants described the ways in which informal teacher leaders use their relationships and connections to various members of the school community to enact the changes they sought. Participants described working closely with teacher colleagues, students and formal leaders to plan and execute their plans. As described previously, non-positional leaders demonstrated a strong commitment to their community and they developed a sense of connectedness with their colleagues and students. These relationships serve as tool for the teacher leaders because community members help to emphasize and execute the informal teacher leader's ideas.

**Relationships with colleagues**. In most of the interviews and surveys, each case of informal teacher leadership action followed a similar pattern of consulting first with a subset of fellow teachers before approaching others. This allowed the teacher leader to begin processing

and shaping their plan in collaboration with a trusted set of colleagues. In some cases, this initial collaboration with teacher colleagues, led directly to the teacher leader accomplishing her goals. Many of the examples from the surveys were about teachers working with colleagues in order to help improve their own teaching or the teaching of fellow teachers. One survey participant wrote, "I recently facilitated meetings to plan professional development in my school." Another wrote about noticing that teachers were worried about certain student behaviors cropping up in the 10th grade classes. This teacher initiated a meeting with colleagues to, "work together…on student support and assessing behavioral trends." Five different survey respondents mentioned serving voluntarily on committees to work with colleagues to find solutions to problems in their schools. One survey response described "chatting" with a colleague and realizing that they were experiencing the same problem with technology, which prompted the teacher to set up a meeting with the director of technology to find possible solutions to the problem.

Seven out of the ten teachers interviewed directly mentioned working with a fellow teacher or teachers to help them solve a problem they identified. Participant H wanted to find a way to teach her students to be more culturally competent. In order to do this, she gathered a group of fellow teachers within her department to help rewrite the curriculum. She wanted team meetings to be more productive and effective, so she offered her colleagues different ways to facilitate the meetings. These ideas were brought to the planning group and Participant I allowed them to choose which of the protocols they preferred. Participant C believed that an administrator was harassing female teachers, but before she began organizing a response to his behavior, she conferred and discussed her observations with multiple teachers, whom she knew and trusted, around her school to make sure that the problem she identified was a valid concern. Similarly, Participant A first surveyed department members to see if they agreed that

assigning a certain text as a summer reading was potentially harmful to students. After getting confirmation from fellow English teachers, he moved his plan of action to the department chair.

In all of these examples, the informal leader sought out their teacher colleagues for help in solving a problem that they identified as important. In most of these instances of teachers exercising their leadership, they use their positive relationship with colleagues to help develop a plan of action or to gain approval for their ideas. Sharing their plans and ideas with colleagues helped them to leverage their power through cooperation and collaboration. Participant G explained that teacher leadership build "casual relationships that can leverage a strong amount of trust." Their ability to harness these trusted relationships with colleagues made it possible for them to act as leaders. The teacher leaders used smaller cooperative circles of teacher colleagues before broadening their sphere of influence and making their ideas more public. In some cases, working with teacher colleagues was all that was needed to enact the change that the informal leader sought to influence. In other cases, the teacher leader continued to push their work outside of their teacher colleagues to influence formal leaders who had the official power to make decisions.

**Relationships with formal leaders**. Many of the teachers interviewed were discerning when they engaged formal leaders to help solve the problem they were working on. While these educators did not always rely on formal leaders to help carry out their plans, those in charge were considered to be integral to most plans of action. Interviewee B used meetings with administrators as intentional times when he could speak up about issues that he felt needed more attention. In one example, Interviewee B attended a faculty meeting that was being led by the principal and attended by the superintendent. Knowing that this meeting held an audience of some high powered formal leaders, he brought up the issue of teacher leadership and the idea

that teachers needed more opportunities to lead within the school. When asked why he chose this venue for presenting his concern, he stated, "I had other department heads there, I had the superintendent there, I had the assistant superintendent, so I knew my audience." He understood that his questions and comments would expand the influence of his ideas, making his thoughts more public. Participant H used a similar strategy when trying to draw attention to the inequities in her school, "My strategy there has been trying to do things like, in faculty meetings, in front of everyone, advocating for those students [students of color]." She hoped to put pressure on the formal leaders to take teacher concerns seriously by presenting her concerns in a public space, which clearly shows the strategy that some educators employ when considering whom they engage in trying to solve problems. These participants described an intentional choice of using their bold disposition to exert pressure on formal leaders and to broaden their influence to include formal decision-makers.

Most examples of informal teacher leaders engaging administrators were collaborative and resembled the strategy used with colleagues by relying on their strong relationships. Formal leaders were described as being helpful to plan out ideas and to seek help in initiating a plan. While Participant H used the strategy of engaging formal leaders in public on some issues, she also reported working with her Social Studies Chair and the English Chair by sharing information from classes that she was taking on cultural competencies and helping them to choose which professional development classes they could offer, based on her suggestions. She understood that her positive relationship with both chairs made it likely for them to trust her judgement on the best professional development to offer teachers in their departments. Participant A followed his discussions with fellow English teachers by approaching his department chair to figure out how they could potentially discuss the topic of the

summer reading in a department meeting. In his interview with me, he made it clear that he had an excellent working relationship with his Chair and that he was comfortable broaching a potentially controversial topic with him. The book posed a problem because of its focus on complex issues of race; because there were no teachers of color in the department at the time, he asked a former English teacher, and current dean, a black man, to join the conversation. This strategy proved very effective and the department did decide to not assign the book over the summer and move it into the school year when more support could be offered to students. Not only did Participant A feel comfortable discussing the problem with his chair, but he also relied on his personal relationship with the dean to convince him that his presence at the meeting would be meaningful in accomplishing his goal of not assigning the book as summer reading.

Participant D wanted to create an observable beehive in her classroom and went through several formal leaders to gain approval for the plan. She explained, "I told her [the principal] that I'd like to do this thing and I'm going to do all of the leg work and she said okay, figure it out and come back to me. Also, my department chair, same scenario. Both of them were really supportive." Both her principal and department chair helped her to shape the final plan and execute it. Her department chair even allocated some funds from the science department to help pay for the project. Participant D's reputation and relationship with her principal and department chair likely influenced their decision to support her idea. In all of these examples, the teacher leaders recognized the benefits of engaging formal leaders in their plans for improving their schools. In these examples, the teacher leaders demonstrated a strategy of leveraging their relationships with formal leaders to achieve their goals. Collaborating with formal leaders to impact their decisions was an effective tool for increasing the teacher leader's influence and power in their community.

**Relationships with students and other community members**. According to the interviews and the survey results, non-positional teacher leaders relied primarily on their colleagues to initiate and execute their plans; however, students and other community members did get mentioned as collaborators as well. Participant D's beehive was built with the help of a local nonprofit organization that helps schools create apiaries. She developed a strong relationship with members of the organization before considering her plan to build an apiary in her classroom. She described several members of the organization as "friends". Students also did a good amount of the labor necessary to build and upkeep the hive. These were trusted students who were in the environmental club that she developed a strong relationship with outside of class. Participant D even met with the nurses and custodial staff to discuss potential impacts on cleanliness and health that the beehive might pose to students. Her collaboration with the nurse led to more protective netting being placed around the hive in order to ensure the classroom bees did not accidentally sting students. By reaching out to the custodians, she made an effort to create more trusting relationships between herself and the people who would be interacting with the apiary when she was not in the room. She understood that she needed to have a good working relationship with custodial staff for the plan to work.

Participant F helped her student group to organize an educational campaign to combat Islamophobia. Students came to her looking for help in addressing this issue. These students felt safe in their relationship with Participant F. In this case, the teacher acted as a leader to students and used the power of students to organize a solution to a problem she and the students were seeing. Participant F recognized that students could have a powerful influence over their school community and she helped to harness that power in collaboration with the students. In these examples, the teacher leader recognized that certain stakeholders had the ability to help them in

taking action to achieve their goals. Due to her strong relationship with students, she was able to leverage their organizational and influential power.

In the survey, a participant described a colleague that they considered an informal teacher leader because the teacher "reached out to the parents in town to start to rework our middle school gay-straight alliance group and form a parent group for the parents with connections to the LGBTQA+ community." In this example, the teacher recognized the power of the parent community to help with a student group and bringing in more stakeholders to help achieve their goals. Teacher leaders are not afraid to engage students, parents, and community members to help them improve their schools and expand their sphere of influence beyond their colleagues. Considering how personal and controversial the topic of sexual orientation and gender can be, it was essential that people working on these issues establish trusting and strong relationships. The informal leader saw their connections with members of the community as assets to their leadership potential because, for informal teacher leaders, working cooperatively with community members is the most potent tool in their leadership toolkit. These same collaborators can also be the motivation and inspiration for certain teachers to take on leadership roles.

**Finding Three: Non-positional teacher leaders rely heavily on their relationships with colleagues and other community members to leverage their power and achieve their goals.**

Informal teacher leaders rely on their ability to form collaborative and positive relationships with people in their school communities in order to lead. Their ability to work with a variety of community members comes from their strong relationships that are a result of their commitment to the community. By virtue of their leadership being informal, they cannot rely on a formal title and inherent power that comes with that official title. Their leadership stance allows them to be creative in engaging the right people to help them influence decision-making. Through a process of drawing in teacher colleagues, formal leaders, students and other

community members they create a team of people who are invested in helping them achieve their goals. Their conversations and work within the community allows them to find allies and these people work with the teacher to exert influence and power within their school. Informal teacher leaders recognized the power of shared leadership and they rely on that power to accomplish their ideas.

## Understanding the Power of Non-Positional Teacher Leadership: A Lesson in Informal Learning

It is important to consider how teachers learn to acquire their informal teacher leadership stance. Responses to questions in the interview revealed that very few teachers had ever been provided with professional development specifically intended to cultivate leadership skills, but many teachers did practice leadership in other aspects of their lives, outside of their role as educators. Those experiences have been valuable in helping them gain an understanding of the power that informal leaders possess and, in some cases, practice the skills necessary in being an effective leader. It is worth noting that for the participants of this study, their conception of leadership formed in informal settings and was not specifically geared to teacher leadership. These outside experiences have effectively helped to shape their understanding of power and influence as informal leaders in their schools. Not only do informal teacher leaders have outside roles as leaders, but they also find inspiration from people that act as positive role models for effective leadership qualities. These role models inspire teacher leaders and can also serve as mentors who help the educator prepare for their own leadership roles.

### Outside Experiences

Teachers who were interviewed had many outside experiences that helped contribute to their understanding of leadership and practice leadership skills. These experiences were wide

ranging and were primarily informal leadership roles that they inhabited outside of their careers as teachers.

**Family Leaders**. Many participants mentioned jobs or roles that they occupied in their personal lives that required leadership and helped to practice skills that they used as leaders. Several of these experiences were directly linked to parenthood and their roles as parents. Two participants mentioned being coaches for their children's athletic teams as an example of needing to lead outside of teaching. Though both teachers seemingly dismissed the experience as less significant than their work as teachers, they admitted that there were some leadership skills that they had to sharpen in order to be effective as a coach.

Five out of the ten interviewees specifically mentioned being a parent as a role that requires leadership outside of the classroom. Participant C said, "I have children. I feel like that makes me a leader. I feel like having children has forced me to focus more on the community aspect of the school and see what's going on in school through a different lens." Participant G echoed this sentiment in her comment about being a single mother, "Being a mom of four kids. My four kids were under nine and I went back to work, and I don't think of it as leading, I think of it as being responsible. I was just responsible for a lot. I guess I lead my household." Participant H also explained that her role as a mother made her a leader outside of her job as a teacher, "I am a mother and…I still feel like a majority of child care and home economics falls on the female in any heterosexual relationship." In these examples, it is clear that for teachers who are parents that their parental duties include elements of leadership that would potentially help them shape their understanding of being a successful leader and that, in some cases, allow them to practice leadership skills in a setting beyond the classroom. The skills that participants valued in their role as parents were being organized, managing complex

schedules, and taking responsibility for decision-making. These are all things that serve educators in their teacher leadership roles.

**Formal and informal positions outside of school**. Several participants mentioned roles outside of teaching where they were asked to be leaders. Participant B began his interview describing his position as an administrator at a summer camp that he has worked at for the past seven years. This experience was foundational in developing his identity as a leader. In one comment he described his transition from informal leadership to more formal leadership roles at the camp, "To see certain positions that I held that were unofficial but then a year or two later were a part of a leadership team or became a supervisory role. To have that and to be part of the creative process where early on when I'm in that role, I'm actually doing some of the creating, is empowering and lends itself to a real dedication and a real loyalty." For him, being able to claim ownership over the creation of certain elements at the camp and also see his informal work rewarded down the line, made him recognize the power of his informal leadership.

Participant E described her time as a youth trip leader for the Appalachian Mountain Club as giving her some of the training and skills needed to be a leader. Trip leaders were trained formally and then practiced those skills once they were asked to lead their own trips. She argued that this role taught her how to, "make sure our tasks were accomplished and designating particular tasks to people and working together to accomplish the greater goal." This role taught her how to lead a group to set and accomplish a concrete task, which is a practical skill for any leader to possess.

Participant D went all the way back to her girlhood in recalling her experience of being a girl scout which shaped her understanding of how to be a leader. As she put it, "My experience with leadership was really early because I was a Girl Scout, so right from third grade we had a

person that was called a leader. I had a very early idea of what that meant." Her experience as a girl scout taught her how to, "listen to the people that are under you and follow through on good ideas…having some sort of vision of what they [leaders] wanted." Participant D's time as a girl scout gave her models of leadership that were attainable and that inspired her even as a child. In this example, Participant D understood that listening was a critical part of leadership; this skill directly relates to an informal teacher leader's ability to be inviting to their colleagues.

**Professional Development**

In some interviews, teachers mentioned professional development opportunities that also promoted useful leadership skills. Participant C attended a peer mediation workshop early on in her career and she still found the techniques useful to her when dealing with colleagues. Participants D and F both mentioned professional conferences related to their subject area as being influential in introducing them to a network of teachers who they could collaborate with and gain insight from, outside of their own schools. These conferences also inspired them to approach their teaching in new ways and bring those ideas to their colleagues and students.

Most of the teachers interviewed had not attended professional development that specifically addressed leadership as a topic. As Participant F bluntly put it, "I've never attended any courses or professional development that have been specifically focused on leadership, formally or informally." Participant H pointed out that while professional development can inspire a teacher to do exciting things, those ideas often require resources and structures that do not necessarily exist in her school. Interestingly, this led her to conclude that in an indirect way these workshops sometimes inspire informal teacher leadership because, "if I want to have that [exciting resource] I then need to fix the building."

Participant I was enrolled in a teacher leadership program through a local university. This was a certification program that met over the summer using a cohort model to create a network of teachers who could help each other once the program was over. Through this professional development, Participant I specifically learned about concepts associated with teacher leadership including how to use protocols, how to create an action plan and to carry through with those plans. When asked if she felt that this program helped her to become a teacher leader in her school she affirmed that it made a big difference. She felt that, "it made me more confident and gave me some other ways to think about leadership. It also gave me a network of teachers to talk to…." In her cohort of, "a whole bunch" of teachers, she was the only public-school teacher. Most of the teachers in the cohort worked for private or charter schools and many went on to become formal leaders in their respective schools; however, for Participant I, the program inspired her to widen her view of how she could influence the teaching profession without having to be formally appointed as an administrator. One area she decided to explore was to pursue opportunities at local universities teaching classroom management to graduate students. Teaching these classes helped her to broaden her teaching impact beyond the walls of her own school and it was an opportunity to diversify her work experience without having to pursue a formally appointed leadership position in her school.

When asked why Participant I was motivated to apply for the teacher leadership program she explained that, "I didn't necessarily think I wanted to move up, but I wanted to do other things, I had other interests besides just teaching in the classroom." She had a desire to expand her professional career, while maintaining her job as a teacher.

**Inspiration and Role Models**

The lack of professional development available to teachers who are interested in leading from their existing role as a teacher does not stop them from using their community to draw out expertise and knowledge about leading. Many non-positional leaders seek out inspiration and role models both within their schools and in their outside communities. In many ways, this demonstrates the very nature of their informal leadership as they are able to find nontraditional forms of leadership education. Teachers who were interviewed took inspiration from a variety of people in their lives to become leaders. There were generally two categories of people who inspired and acted as role models for the teachers -- family and friends. These people did not directly teach leadership skills, but rather, they made contributions to the teacher's understanding of the potential power and influence that an informal leader could have on their communities.

**Family and friends.** The participants drew inspiration from many people in their lives. Participant C spoke fondly of her mother as a source of inspiration and as a role model for strong leadership. Her mother had three kids, which she raised on her own, while also creating a successful medical career. She spoke of her mother teaching her several things about leadership. For example, "A leader is somebody who does something that's hard even though it's hard…True leadership is about doing things authentically, not because you are a leader" and "I think often times it's the people who are behind the scenes that actually are collectively making a larger difference than someone who chooses to put their name on a poster." This last quote speaks to Participant C's understanding of the importance and influence that an informal leader can have in any setting. Participant E spoke of her grandmother as a person who inspired her to be a leader. Her grandmother's character is what impressed her. She described her grandmother as fearless, wise, well-educated and open-minded, and emphasized that these are qualities that

Participant E also strived for in her own life and arguable contribute to an informal teacher leadership stance.

Participant F spoke of a close friend who is a nurse practitioner and whose, "trajectory in being a leader is kind of similar to how I see myself going from almost the bottom up, from the grassroots up." She worked with the homeless early in her career and then moved into public policy in order to change the way insurance policies cover at-risk patients, based on her close work with the homeless. For participant F, the fact that her friend chose to be a nurse rather than a doctor was appealing and served as a comparison for her own work with kids. She explained, "she's a nurse practitioner, which appealed to her because you don't have to be the doctor or the head of the hospital in order to lead the way on progress. [As a teacher], you do bring some insight and experience when you work day to day with the student population." In this example, Interviewee F learned from her friend who is a nurse practitioner that her role as nurse was as essential as the doctors that are often seen as the formal leaders in the hospital setting. Interviewee F drew a direct parallel to her experiences teaching in schools where the administrators are sometimes portrayed like doctors, as having the most important leadership roles in the school, however, teachers are also essential leaders. Interviewee F demonstrated her belief that an informal leader derives their power from their proximity to the people that they serve. In the case of her friend, the nurse practitioner has the most contact with the patients and in her own case, the teacher interacts most with the students.

**Educators.** Some of the teachers interviewed found inspiration in their own teachers. Participant B spoke fondly of two teachers he had in high school as leaders who he modeled his own behaviors after. These two role-models showed him that being passionate and genuine were important qualities in an educator. One of his role-models was a teacher and the

other was a dean. Similarly, Participant F was inspired to become a teacher by a professor she had in college. This teacher made her want to study Arabic and she felt that her professor had a "natural talent" for teaching and connecting with students. This influential professor continues to be a source of inspiration for her as she tries to demonstrate the same level of passion and competency as her professor did.

Colleagues also motivate teachers to lead and teach them some of the skill necessary to be effective leaders. Participant B cited two colleagues who he admires for their leadership skills. One colleague is solution-oriented and tends to move past the complaining stage into an action plan. He claimed that, "she made me see a flaw in the way that I approach things." He believed that he was good at identifying a problem but not necessarily moving to a solution to the problem. His colleague taught him to move more towards action rather than observation and complaints. The other example was another colleague who helped to coach him on how to bring a problem to his department chair in order to accomplish his goal. The ability to take action after identifying a problem is one of the key element to being an effective informal leader and Participant B learned this from his colleagues.

Participant D identified her current principal as being a leader she admired. She described her principal as fair-minded and having conviction. She appreciated that the principal was always willing to listen to teachers and that she made the teachers in the school feel like they were part of a team. She also admired how the principal was able to make teachers feel supported but also held them accountable for their actions. Participant D saw her principal as a strong role model for leadership. This is also the principal who encouraged her informal teacher leadership in starting a beehive observatory in her classroom; her principal was not only a role model but also a catalyst for her to achieve her goals as a non-positional leader.

**Finding Four: Non-positional teacher leaders use informal, indirect and unplanned methods to shape their understanding of power and to gain the skills necessary to be an informal leader.**

Teachers who want to lead are rarely given the opportunity to participate in a professional development experience geared specifically to teaching them leadership skills. This does not impede teachers from learning more about the skills necessary for leadership; it simply requires them to educate themselves in more nontraditional ways. Some teachers gain useful leadership skills through professional development that highlights a skill or concept that can be applied to leadership. Others gain experience outside of school and bring that knowledge into their roles as teachers. Teachers find inspiration and motivation in many people including family, friends, and colleagues. These people serve as role models for teachers and inspire them to lead. Sometimes, these role-models help by providing successful examples of strong leaders, while others actually act more as informal mentors by giving advice to the ITL on how to lead more effectively.

## Motivations for Informal Teacher Leadership

The teachers who step into the role of informal leader do not receive any compensation for their extra work and they do not receive any formal training on how to successfully navigate this form of leadership. Questions about what motivates these teachers to move outside of their own classroom to act as leaders are essential to this study. The results from both survey participants and interview participants demonstrated a remarkably wide range of motivations for engaging in teacher leadership behaviors. Analysis of the data pointed to many connections between what motivates a teacher leader and their dispositions, the type of work they do and their collaborative leadership stance. The motivations reported did vary widely, however, there were some clear connections between responses across all participants, including survey participants. Teachers take on leadership roles to keep their job as teachers interesting and

fulfilling, to help students, to build collaborative relationships with colleagues, and as already discussed earlier in the chapter, to help solve problems.

**Efficacy in the Teaching Profession**

**Efficacy in teaching.** Teachers expressed that a desire to stay interested in teaching led them to engage in informal teacher leadership. The top motivation reported in the survey, at 15% was that teachers chose to lead "to improve [their] teaching". Another top response from the survey was that teachers were motivated to act as leaders to "infuse [their] career with more diverse experiences and avoid 'burn out'", evident in 11% of the responses. Interviewees further explained that teaching could sometimes be a repetitive job that could drive some away from the profession. The teachers interviewed explained that they sought out leadership roles in order to satisfy their personal needs to keep their teaching sharp, interesting, creative and effective. For example, Participant E explained that acting as an informal teacher leader was, "energizing by collaborating and sharing ideas." Participant J said that she was motivated by, "the drive to do better." Speaking to the personal motivations that keep teachers interested in their job, Participant G said that being a leader was important, "to satisfy my personal need for creativity…I'm constantly reinventing and inventing new things and that's what keeps me in my job and keeps me happy in my job." One of the participants who entered teaching more recently mentioned that she liked being a non-positional teacher leader because it kept the job interesting. When asked if she would consider applying for an administrative position in the future, she said "it's hard, the thing with teaching is there's no real upward mobility…It's really going to determine for me if I get bored, if I'm not feeling fulfilled, if I need a change, or not." She concluded by explaining that for now, the work she does as a leader felt compelling and impactful. In these interview responses, teachers expressed an awareness that there is a potential

for a classroom teacher to become bored with their routines and become less effective overtime. Engaging in leadership behaviors varies the routine for these teachers and acts as creative outlet by energizing them in ways that their ordinary teaching duties may not over the course of their careers.

**Helping Students**

Overwhelmingly, teachers interviewed said that students were the primary motivation for acting as an informal teacher leader. A statement from Participant C sums up the data well in terms of students as a motivating factor: "As a teacher I think I'm most motivated by the students, by whether something good is happening with students that makes me want to get involved with that or whether I see that there's a real problem for certain groups of students that needs addressing." Participants identified two ways in which they are compelled to become leaders: either students are leading some sort of change or action in the school that makes the teacher want to help them and get involved and/or the teacher is motivated to lead because of a problem that their students face. Throughout the interviews, teachers continued to give examples of these two motivations regarding their interactions with students.

According to Participant A, informal teacher leaders are motivated by students, "It's all about the kids…that's a stupid thing to say because it's so obviously all about the kids." Participant C commented that, "I am most motivated by the students." Participant G echoed these sentiments by stating, "I'm trying to make a difference and teach young kids to be better human beings [that] is my ultimate goal." Finally, Participant H claimed that "…when it [being an ITL] is good for the students. If I know that something could happen that would make it better for them I'd like to make it happen." All of these teachers identify their students as the primary motivating factor in taking on leadership within their schools.

Survey participants also identified their desire to help students as a primary motivation through the examples they provided of times when they engaged in leadership behaviors. Most of the examples were focused on helping students. A survey participant reported stepping into a leadership role when a group of students needed help advocating for graduation gowns that were not colored according to gender. Another survey participant wrote, "After data came out that students of color were overly represented in our discipline data, I questioned the absence of such supports for students of color such as affinity group, faculty members of color and positive representations in curriculum." Yet another survey participant wrote of their work in creating a "centralized system for helping students learn about after-school and summer internships." This teacher was motivated enough to bring the issue to the attention of the administration, serve on a system-wide committee and even provide students the support that they need to find these opportunities himself. This was all done outside of his typical teaching responsibilities and with no compensation.

When asked what type of problem has motivated them or would motivate them to act as a leader, nine out of ten interviewees specifically described problems that directly impacted their students. Participant F explained that they were most likely to act on, "Issues surrounding my students experience of school, that motivated me to do more in terms of helping to support them and combat bias at our school." Participant C expressed a similar desire when acting as a non-positional leader, "When I feel a group is being particularly discriminated against…that indicates to me that there's a culture in the entire community of the school and that [female] students must be feeling that also." Participant C felt compelled to help change the culture of her school because of the potential negative impact that culture had on students. Students are not the only people who motivate teacher leaders, colleagues are also central to their motivation.

**Collaboration with Colleagues Increases Motivation**

Closely connected to the previous motivation of helping students are teachers' desires to work collaboratively with their colleagues to make their teaching and their work more fulfilling and effective. Many teacher leaders reported that their colleagues motivate them to improve their teaching methods and to collaborate in order to make their teaching better. Participant E explained that for her, building relationships with colleagues was a "natural motivation" to be a leader. According to interview participants, the problems that motivated teachers to take on informal leadership roles were focused on students but required help from colleagues and were many times encouraged by colleagues. All ten of the teachers interviewed needed to collaborate and work with their colleagues in order to solve the problems, as demonstrated earlier in this chapter.

**Colleagues motivating to solve problems**. It was through conversations with fellow educators that the participants in this study began taking on an informal teacher leadership role. These teachers worked alongside other informal teacher leaders or formal leaders to accomplish their goals. For example, participant H felt that some racist and discriminatory beliefs and language among students had found their way into the culture of their middle school. She talked with other teachers within the Social Studies department to see if they felt the same way. These conversations led to several teachers encouraging participant H to help organize a revision of the geography standards to address cultural competencies. In addition, the chair of the department actively encouraged and helped her to organize a regional conference for other middle school teachers in the area, in order to add cultural competencies to their curriculums. In this example, it is clear that while the students were the initial motivation for participant H's desire to solve a problem in the geography curriculum, it was her colleagues in the Social Studies department that

gave her a boost of confidence and who helped her to execute the solution. Her colleagues, including a formal leader, motivated her to expand her influence outside of her department to other schools in the region.

**Helping colleagues.** Some teachers also expressed a need to give back to their colleagues. As mentioned earlier in this chapter, an informal teacher leadership stance includes the desire to positively impact the teacher's community. Several survey respondents wrote about wanting to repay their colleagues, "When I first started, I had informal mentors who greatly helped me become the teacher I am today. So more or less I feel obligated to pay it forward" Another survey respondent wrote that their biggest motivation was a feeling of, "reciprocity: helping others as I have been helped." In the interview, participant F claimed her biggest motivator is her relationship with colleagues, "having a collaborative relationship with my colleagues is probably the biggest one [motivation]. I really appreciate it when they share things with me…so I want that to go both ways." Participant I was asked by her colleagues to help run team meetings so that the meetings would run more efficiently and be more effective. Although she has two young kids and often feels stretched in many different directions, she agreed to help the team by facilitating the meetings with some protocols. She described her team as "good friends" and that doing the leadership work was a way of helping her colleagues.

Several teachers expressed a desire to help colleagues be more effective. Participant A talked about how sometimes, the extreme focus on students allows the conversation to shift so dramatically that teachers' well-being and ability to teach effectively is lost. He feels motivated to speak up in department and faculty meetings because, "I've seen the way my colleagues have helped me be better" and that speaking up is important because, "we are allowing certain teachers to be marginalized because we haven't pushed for some changes that would make

everybody better." Participant J described informally mentoring new teachers in her department because she remembers how hard it was to be a new teacher. She also reported feeling more excited and "refreshed" when working collaboratively with younger teachers. Participant G reported wanting to act as a model for other teachers on how to work collaboratively and be more vulnerable to constructive criticism in order to improve her teaching. As she put it, "teachers have a tendency to hide in their room and do their own thing because they're afraid of judgment." This motivated her to co-teach a class with a colleague and invite teachers to come observe their classes. By allowing colleagues to come see her classes, she models a vulnerability that she hopes to see in all teachers.

These examples demonstrate that non-positional teacher leaders have a sense of membership in a teacher community within their schools. These teachers want to be productive members of their professional community who offer their skills to improve everyone's teaching, not only their own teaching. They feel a personal responsibility to fellow teachers and the examples participants provided show a strong commitment to being active and productive members in the schools, especially when it relates to helping colleagues. Informal teacher leaders are motivated by their colleagues to occupy their leadership stance. It is often their fellow teachers who provide them with the confidence and help needed to lead on issues that are important to them. Colleagues are necessary collaborators for teacher leaders to accomplish their goals and they are sometimes the ones who ask the informal teacher leader to take on certain leadership roles. Not only do they help these teacher leaders to accomplish their goals, colleagues are sometimes the catalyst for them by energizing and motivating the teacher to set a good example for their colleagues. Many informal teacher leaders feel indebted to their colleagues for the help that they give them and that, in turn, motivates the educator to do more

informal leadership work within their schools out of a sense of reciprocity. Non-positional teacher leaders are very committed to their professional community of teachers.

The survey results clearly indicated that non-positional leaders are highly motivated by their desire to work with their colleagues and their larger community. Thirteen percent of respondents noted that they were motivated to lead, "to gain a greater sense of belonging and investment to my school community" and 11% of survey respondents also felt that they wanted, "to reduce the isolation of working alone in my individual classroom". These motivations point to a desire to work with others and to be able to help their wider communities.

**Desire to help the teaching profession**. Informal teacher leaders not only care about their local school communities. Of the ten teachers who were interviewed for this study, four of them portrayed an informal teacher leader as someone who has made a commitment to helping more than just their school communities. Indeed, these four teachers reported activity that appeared to represent a commitment to helping the teaching profession at large and had taken steps to act on that idea. Interviewee G wrote a book about teaching graphic novels, "so sharing that with not just my own community but beyond the school to the broader culture…I work for [a New England English teacher professional organization]. I teach teachers how to teach the graphic novel." In addition to writing a book to help other teachers, she also regularly presents at national conferences to help English teachers across the nation with a problem that she first faced when teaching a non-traditional text.

Interviewee F allowed a national organization to film her teaching Arabic to upload on the organization's website and use as an example for teachers around the world on how to teach Arabic using a student-centered model. This video filming subsequently led to an opportunity to present at a national conference, which she pursued. Inspired by the success of this experience,

she later applied to present in Qatar on how to plan a curriculum unit in her discipline. There are very few teachers who teach Arabic and she felt it was important to help her wider community of Arabic language teachers, even though this meant more work for her to prepare workshops and lectures for these conferences.

Interviewee I spoke of the satisfaction she had in being able to teach graduate classes at two local universities on classroom discipline. She finds the work rewarding because it is in service of helping new teachers who are just getting started in the profession. Interviewee H was in the midst of planning a regional conference for middle school geography teachers. This type of conference did not exist and so she decided that it would be incredibly helpful for seventh grade teachers who teach geography to come together and collaborate and help each other. She was in the middle of the planning stages of this idea when she was being interviewed for this study and she expressed how difficult and time consuming the entire process was for creating a conference of this size from scratch; however, she felt that the effort would be worth it, because so many teachers in MA would benefit from the shared knowledge.

All four of these examples demonstrate a spectrum of motivations that effected change both in their own schools and for the teaching profession at large. According to the participants, they not only have a sense of themselves as teachers in a classroom and within their own schools, but they also see themselves as important members of a much larger group of educators. They have a desire to reach out to this larger community and share their knowledge.

**Finding Five: Informal teacher leaders rely on intrinsic motivation to lead. They are motivated primarily by the desire to improve their teaching to help students and by their strong sense of community obligations.**

While there are a variety of motivations that teachers have for stepping into a leadership role, the primary motivation for teachers is the desire to solve problems and find solutions that

will benefit their students and their colleagues. Non-positional teacher leaders are strongly community oriented and they have a sense of duty to their students and colleagues to help in any way possible. This desire to give back to their communities also applies the teaching profession at large. Ultimately, informal teacher leaders engage in leadership behaviors because they see themselves as critical members of a larger community and that they have useful skills to help these communities.

### Dynamics of Informal Teacher Leadership Power and Influence

The teachers who participated in this study provided evidence of their strong commitment to their students, colleagues, and to their larger communities. They were motivated to solve a variety of problems and to use their leadership stance to improve the schools that they worked in. These informal teacher leaders used a collaborative approach to identifying and addressing issues that inspired them to lead. This study has provided ample evidence that teachers are adept at using their informal power to influence their colleagues and enact change in their schools; however, it is critical to examine the dynamics of their power and influence by investigating their understanding of how the informal nature of their leadership impacts their ability to act as legitimate leaders in their schools. Because their power is not derived by officially sanctioned duties and responsibilities, their ability to lead is in constant tension with the factors that can encourage and discourage their leadership. The teachers in this study acknowledged that formal leaders, such as administrators, had a significant influence on their capacity to lead. The data from the interviews and survey showed that formal leaders were not the only factor that was important to understanding these dynamics of the teachers' non-positional power and influence, but that formal leaders were often in control of those factors.

**Clear Distinctions Between Informal Teacher Leadership and Administrative Positions.**

Most of the teachers who participated in this study did not act as informal teacher leaders as a means of pursuing more traditional, formal, leadership positions. Only one interviewee described a desire to become an administrator; Interviewee B mentioned at the beginning of the interview that he was hoping to get certified as an administrator and eventually become a dean or principal, however he did not directly link his leadership behaviors with this desire to be a formal leader. Very few of the teachers interviewed connected their actions as a leader to a pathway to formal leadership positions.

Many of the teachers in this study have, at some point in their careers, considered the idea of being more formal leaders, especially the position of curriculum coordinator. Participant I said, "I used to really want to be a department head, but the way our school works is our department heads are administrators. I don't want to do that." Participant C spoke honestly about how many educators might consider the idea of being the leader in charge of the school or department because it would be "kind of cool…but I think that pragmatically that's not true so I think that as much as my ego, like anybody else's, sometimes makes me think if I were in charge it would be great, the realist in me knows in a lot of ways you make more of a difference not being in charge." In this case, Participant C referred to a core belief of informal leadership which is that informal leaders have a significant amount of power to influence decision making through means other than an officially sanctioned leadership title.

None of the participants interviewed had pursued a formal leadership position and most claimed that administrative positions are essential to a strong school culture, but in practice, it would be a leadership position they would not enjoy. As Participant A put it, "do I really want to spend more time in meetings and to what extent is that job going to be as satisfying as

teaching? Some of the informal teacher leadership stuff is pretty satisfying." For the teachers interviewed for this study, very few took on informal leadership roles as a possible route to more formal leadership roles. Teacher leaders do not necessarily see formal leadership positions as providing the same outlet and positive benefits as informal teacher leadership. According to the interviewee's perceptions, some of these formal leadership positions are more focused on managerial tasks rather than being able to pursue a specific issue that a teacher is passionate about. For teachers who take on leadership roles in a more informal setting, they are given more space to pursue their own interests and are not bound by the same constraints as formal leaders, which makes non-positional leadership more appealing.

When asked about taking on more formal leadership positions, participants expressed a reticence to leave the classroom where they believed they would have the largest impact on students. Participant A continued his thoughts on becoming an administrator by adding, "I have a theory that every step you get out of the classroom you actually have less of an impact about what's going on in the school and that's what I worry about." Participant C expressed doubt that many administrators are able to keep close ties to students, "I'm in it for the kids and I like to keep it real with them and I feel like it takes a very special person in a leadership role and still be able to keep it real with students." Of the ten teachers interviewed, seven specifically mentioned the desire to stay in close contact with students as a primary reason why they would not want to become more formal leaders. For non-positional teacher leaders, interacting with students on a daily basis and forming close relationships with students is essential to their conception of the teaching profession. They noted that administrators and more formal teacher leaders do not often interact with students directly, thereby putting distance between themselves and students. In their desire to stay connected to students, these teachers seem to also be expressing the idea

that informal teacher leaders derive their power and legitimacy from their close contact with students. In light of this, it is not surprising that teachers also identified students as their primary motivation for pursuing teacher leadership.

**Promoting or Discouraging Informal Teacher Leaders**

Non-positional teacher leaders who participated in this study described many people and conditions that both encouraged and discouraged them from taking on their teacher leadership roles. For example, the participants described administration as having the potential to promote or discourage leadership, which demonstrated a possible tension between the formal power structure and the informal power of a teacher leader. The analysis for this section is organized in a way to show the contrasting potential for each factor. While interviewing the teachers, the questions about encouraging and discouraging leadership behaviors were separated, but teachers tended to talk about them as if they were combined; it became obvious that for the teachers there was a fluidity in each category that could move from encouragement to an obstacle depending on the circumstance and vice versa. It is interesting to note that students were never mentioned as a group of people discouraging informal teacher leadership behaviors.

**Friends and Family**

**Encouragement**. Several teachers interviewed mentioned friends and family members who encourage them to engage in informal leadership. Participant A mentioned that his wife was an English teacher in a different high school and that she acted as a sounding board for him, "it matters a ton that [my wife] does what I do, and I can run all of my ideas past her…I can bring ideas out onto the table." In this case, Participant A was referencing ideas that he used to press forward on his actions as a leader, such as changing the English summer reading book. Participant J recalled asking her husband for advice whenever she was unsure what action to take

at work. Participant C enjoys the support she receives from her family whenever she is dealing with tough issues at work, such as speaking at a school committee meeting on behalf of other teachers. She reported, "My family is very supportive. My mother is very supportive whenever I tell her about something at school." Participant E's best friend also works in the field of education and she finds herself talking with this friend about student issues and the things going on at work. She and her friend, "keep it light and try not to get ourselves stuck in the ridiculousness of teaching and the demands." For the teachers in this study, friends and family act as supportive people in their lives who are able to encourage their work as teachers, which all of the participants answering this question intuitively believed included their actions as leaders. Family members and friends provide an outsider's view of the teacher's work and they act as a sounding board for the informal teacher leader.

**Obstacle**. While it is clear that friends and family can be a crucial support network for an informal teacher leader, some teacher leaders also saw their families as potential obstacles to being leaders at school. Comments on this were primarily devoted to the responsibilities associated with parenthood and marriage that make it more difficult to devote time leading at school. As participant A explained that his biggest obstacle to being a leader is, "My children, in a good way." Participant I also identified her family as an obstacle to her work as a leader, "My family, not because they get in my way but because I want to spend time with them." For non-positional leaders, their family responsibilities are a top priority and can make it more difficult to lead. Teacher participants who spoke about their families as obstacles specifically stated that they did not wish to prioritize leadership activities over family obligations. Leadership behaviors go above and beyond typical job descriptions for teachers therefore, these teachers must

constantly weigh outside demands such as family obligation before jumping into a leadership role at school

**Teacher Colleagues**

**Encouragement**. Seven out of the ten teacher interviewed specifically mentioned colleagues as a positive influence on their work as leaders. Participant B described the teachers who encourage him to take risks as, "some of them are more informal where they may just be classroom teachers or in those informal roles." Participant F stated, "I think with some of my colleagues are, they don't necessarily ask me, again since I'm new they don't expect me to lead, but now that I've developed a reputation of being the language lab guru they do. They don't expect, but they ask, they encourage me." Similarly, Participant A spoke of the "debt" that he owed his colleagues for supporting him and encouraging him to lead. Returning to the theme of reciprocity, he explained, "the teachers around me, my colleagues, are absolutely huge. I feel like I owe a debt to a guy that I …have been on a teacher team with for years. He's the one who stretches what I think a teacher leader is because he is in no way ever taking that alpha role, but man does he make everything better." In this example, Participant A's colleague typifies someone who can have impactful presence without being overbearing. Participant E mentioned a colleague in her department who really supports and inspires her. Her appreciation for this teacher was apparent in her description of him as, "amazing, phenomenal, and humble at the same time and we just roll together. He has a lot of energy and passion for teaching and I'm just so grateful to work with him every day." Participant E went on to say that this relationship provided her with support and that her colleague helped her to brainstorm ideas and execute them when she needed help. Like friends and family, teacher colleagues provide support and encouragement for teacher leaders. This is closely linked with an earlier theme of colleagues as

motivating factors in leadership behaviors. Colleagues can inspire and support informal teacher leaders in their work, offering an insider's viewpoint on the issues and problems that the teacher is working to solve. As presented earlier in the chapter, positive relationships based on trust form the foundation of a teacher leader's ability to influence and exercise power in their schools. The examples provided by the participants suggest that informal teacher leaders are so interconnected with their colleagues that they produce a synergy that propels their leadership forward.

**Obstacle**. Interviewees described colleagues who sometimes dismissed or discounted their work as leaders. Like the other factors, colleagues introduced and interesting tension or friction in the dynamics of influence and power for teacher leaders. Colleagues clearly stimulated leadership for non-positional leaders, but they could also act as an impediment. Simply stated, Participant A claimed that, "there are colleagues who make it difficult." Participant E reported that, "there are a number of people on staff that are 'yes-ers' and that bothers me to no end." She explained that these colleagues encourage and "enable" administrators to lead without much input from teachers. Sometimes colleagues express concern for non-positional teacher leaders because of the extra time and effort they put into their work outside of the classroom. Participant F mentioned that, "there are some colleagues who see me working a lot…and worry that I'm overworking myself." Participant C relayed an example of a colleague who regularly disagreed vocally with certain actions and ideas that teachers in the building were trying to lead. While it is expected that not every teacher would agree with a teacher leader, in this case, the goal seemed to be to simply derail the plans of the non-positional teacher leader. This particular colleague did not look at ideas with an open mind and often disrupted conversations that were meant to be productive towards a goal.

In these examples provided by participants none of them described colleagues as directly attempting to stop leadership behaviors, however, colleagues might not support the goals of the teacher leader and could act in ways that obstruct the teacher's activities. When colleagues express concern about informal teacher leaders being overworked, there may be an underlying message. Leadership work is seen as extra and makes colleagues who are not engaged at the same level, seem less competent or uncaring of their schools. This could cause some colleagues to undermine leadership behaviors in other teachers at the school. Colleagues might also interpret informal teacher leaders as threats to their own ideas and power.

**Formal Leader Colleagues**

**Encouragement.** Many of the teachers interviewed identified formal leaders in their schools who were integral in their success as leaders. Six out of the ten teachers specifically mentioned their department coordinators as a person who actively supported and encouraged their goals and actions as informal leaders. Participant A wanted to make a, "nod to the administration, I do feel my department chair and sort of writ large the administration does give space for teachers to do things at my school." Participant H echoed this sentiment by mentioning that for her, "my curriculum coordinator and my assistant principal. They are usually the ones that I go to, to bounce ideas off of and talk about problems I see." Participant D confirms the fact that formal leaders can often be a positive influence on informal teacher leaders, "my department chair has motivated a lot of [my leadership]." Participant F explained that her, "program director…congratulates me when I do [act as an ITL] or she tells me I did a good job or says she is proud of me." Not only do these formal leader support and encourage leadership behaviors, but they are also the teacher leader's direct supervisor. For some teachers, this could be a powerful motivator and confirmation that their work is valued. Participant F mentioned this

in her interview, citing her evaluations as a secondary motivator for her work as a non-positional leadership.

In these examples, it is evident that the formal leaders appreciate and share the goals of the teacher leaders. Especially when considering the department chair whose job becomes easier if there are informal teacher leaders who are motivating colleagues to become more effect in their teaching. That has a direct connection to the goals of the chair. The examples provided by participants demonstrated that the formal leader was willing to share their power and influence. These formal leaders acted with flexibility and enthusiastically encouraged the teachers to fully inhabit their informal leadership stance. Data presented throughout this chapter support the idea that formal leaders who embrace teacher leadership make it possible for teachers to act as positive agents for change in their schools.

**Obstacle.** It is a powerful motivation to receive praise and encouragement from your supervisors and other formal leaders at the school. It is almost equally as deflating to feel as though your formal leaders do not support teacher leadership. Participant B characterized his principal as someone who is not an obstacle, but a "hindrance" to teacher leadership. The principal did not prevent Participant B from acting as a teacher leader, but it was clear that the principal preferred that teachers simply follow the lead of the formal leaders, rather than question the formal hierarchy. Participant C gave an example of formal leaders only paying lip service to teacher leadership in her school. She served on a committee with fellow teachers and administrators to help decide what the appropriate use of technology would be in classes. It only took her a few meetings to realize that the committee was not going to make any difference in the technology policy, because the administration had clearly determined what they wished the policy to be. She claimed that, "the school district was very interested in having this program

[giving each student a laptop] and in my mind part of the reason why was because it looked flashy and it's something that they wanted to say that they had, and they'd already made up their mind." Plainly put, Participant C stated that there was, "no indication in the town that the school committee ever takes the opinions of the teachers into account."

Participant E's department chair actively discouraged creative ideas from her staff because she was often preoccupied with everything that could go wrong. This makes it more difficult for teachers to take risks and lead other teachers. She also believed that sometimes the topics that teacher leaders want to tackle, such as race, makes administrators uncomfortable and fearful of teacher leadership. Participant J's long career gives her the perspective that depending on your administrators, you may or may not get support for the ideas you have, therefore making it difficult carrying through with a solution. Oftentimes, it is the administrators who have the power to support or prevent a teacher leader's idea from being carried out. It is also important to note that six out of the ten teachers interviewed reported that whenever they interacted with their administrators in a formal setting, such as faculty meetings, the style of leadership was hierarchical and discouraged teacher participation. This implicitly sends teachers the message that they are not considered partners in leadership with their formal leaders.

**Factors that Encourage Informal Teacher Leadership**

In addition to identifying people who encourage informal teacher leaders, participants were asked if there were other factors that might encourage them to become leaders. While three themes of time, space and resources emerged from these answers, it is interesting to note that nearly all of the responses directly mentioned the administration as a key component to creating an environment in which these factors could exist. As participant F put it, "The headmaster says it [encouraging TL], that's definitely a part of it. His whole vibe is about respect for teachers and

seeing teachers as professionals and him supporting the teachers at his school." Again, returning to the earlier theme that formal leaders have a strong influence on the development of teacher leaders. All participants pointed to the need for time to engage in leadership behaviors, the space to have teacher leaders and/or the resources to carry out their ideas. The perception of these non-positional teacher leaders was that it was the formal leaders of the school that had the power to provide more time, space and resources for leadership behaviors to exist and flourish among teachers.

**Time**. Many of the teachers interviewed claimed that having the time and space to engage in leadership behaviors was essential to encouraging them to act as leaders outside of the formal hierarchy. In terms of time, these responses were mostly geared to having time with colleagues to collaborate. Participant C worked in a school that has a common planning block for all departments. These blocks are schedule in place of a fifth class, making the collaboration time extremely effective because the time is carved out of the schedule four of five days of the week and the teaching load is reduced to make collaboration more effective. Participant E mentioned that something that would encourage her to engage as a leader more often would be an increase in common planning time with her colleagues. Currently, teachers do this outside of the contractual hours or during some of the faculty and department meetings. Participants J, H and I all mentioned the need for more time to be able to take on more responsibilities as a leader. The time is not only for informal teacher leaders to be able to work, but as Participant H pointed out, it is also a willingness to invest time in creating leaders among the faculty, "the administrators we have actually want to invest time to develop their teachers and staff." Participant F said that the lack of time was the number one obstacle for her work as a leader. She mentioned that the time it took to plan for four classes and simply do her contractual duties, it is difficult to get

enough time to do work outside of planning her classes. Participant H also mentioned the lack of time as an obstacle to her leadership. She specifically felt that there was too much time devoted to clerical work that felt unnecessary and that encroached on her time to lead on issues that matter to her such as the geography conference that she was organizing for some regional school districts. It does take time for teacher leaders to operate and accomplish their goals and while all teachers would enjoy more time to improve their teaching practices, leadership behaviors require additional effort outside of their duties as teachers. While all of the interviewees continued to behave as informal leaders without additional time designated for their leadership activities, they all expressed a desire to do more and that they needed additional time to act on their ideas.

**Space**. Interviewees reported that in some cases, their leadership came about because there was a space, or opportunity, to lead. The term "space" is used intentionally; it represents both literal space and the opportunities for teachers to take on leadership roles. Participant C mentioned that there was no part of her high school that was intended for teachers to gather and share ideas. She spoke of the overcrowding in the student population, which leads to, "very few common spaces for teachers…there's not a lot of accidental time bumping into other teachers." Participants E and H also stated that their schools tended to operate in departmental silos which discouraged teachers from working outside of their smaller teacher communities in shared spaces.

For Participant A, he claimed that weak administrative leadership over the course of many years created a need and an opening for strong teacher leadership. In this example, a void in leadership created an opportunity for teacher leaders to step in. On a more positive note, Participant F asserted that her principal provided teachers the opportunity to develop meaningful professional development for fellow teachers, "teachers have had the opportunity to participate

in planning a bunch of professional development meetings and that is definitely a part of it [encouraging ITLs] too." Participant I also mentioned a similar sentiment, "they [administration] have some opportunities for you to showcase some of the stuff you're doing and share your ideas with others." Teachers need opportunities to showcase their knowledge and be encouraged to step into their leadership roles. When these opportunities exist, there is space for the informal teacher leader to operate. These examples reinforce the earlier premise that formal leaders must be willing to share their power with teacher leaders by creating the literal and figurative space for them to act.

**Resources**. Teachers also mentioned that when their schools devoted resources to robust professional development and to funding teacher ideas, this was perceived as encouraging their actions as leaders. Participant D spoke about how lucky she felt to work in a school system that encourages teachers to act on their ideas, "…if we come across a thing that we think would help us be better teachers or create a better environment for students, not just in the classroom but in the overall school culture, we can propose it, write a one-page thing about it, and we get funding." Participant F mentioned that her school had put money into, "a lot of teacher-led professional development this year." Several of the interviewees mentioned paid summer workshops to develop their concepts; this example touches on both time and resources. Participant H suggests that her administration is willing to nurture the leadership among the faculty and pay the funds necessary to keep an experienced staff, "They have a sincere interest in keeping their faculty as opposed to wanting to trade them for someone cheaper." Interestingly, Participant H also listed a lack of resources as an impediment to her leadership. While her administrators valued experienced teaching, they are also faced with a dwindling budget and are chronically "underfunded, and understaffed." All of these examples provide evidence that non-

positional teacher leaders feel encouraged when their school systems devote resources to their leadership potential.

**Finding Six: An informal teacher leader's ability to exercise power and influence is impacted by their relationships with colleagues, especially those who hold formal positions of power.**

The dynamics of informal teacher leadership power and influence are heavily impacted by relationships with colleagues. Actions taken as a teacher leader are often outside of the boundaries that are typically associated with being a classroom teacher. This means that non-positional teacher leaders act when they are given the opportunity to do so. With all of these relationships, there is a potential tension that exists between the teacher leader and the colleague who may either see the teacher's leadership as helpful or as a potential threat to their power. Teacher colleagues are often a positive force in helping informal teacher leaders to expand their influence. Formal leaders in the school play an especially critical role in nurturing leadership behaviors when they are willing to share power and encourage non-positional leadership. Formal leaders are often in control of some or all of the factors that can encourage informal leadership behaviors such as time, space and resources.

## Chapter Conclusion

The phenomenon of informal teacher leadership is complex and multifaceted. The participants in this study presented evidence of informal teacher leaders as educators who care deeply about their profession and their school communities. Non-positional teacher leaders choose to inhabit a multidimensional leadership stance that is predicated on their strong professional relationships and their desire to positively impact the people in their communities. The participants in this study demonstrated that they had the power to address a variety of issues within their schools and beyond their school communities. While the data revealed encouraging

potential for teachers and schools who embrace informal leadership, it also demonstrated that there is a need for teachers to be given the time and space to practice and reflect on their leadership. As well, there is an essential role for formal leaders to take in encouraging and sharing leadership power. The analysis of the data led to six findings that helped to inform the answers to the initial research questions that guided this study. Below are summaries that offer answers to these four essential questions.

**RQ 1: How do teacher leaders understand the concept of informal teacher leadership?**

Non-positional teacher leaders possess certain dispositions that make them particularly suited to the role of leader. These dispositions are not simply personal qualities that a teacher manifests, they are central to their leadership stance and their understanding of their role as both a teacher and a leader. Informal teacher leaders appear passionate, right-minded, bold and inviting to colleagues. At the core of a teacher's leadership status is the experience and competency that they exhibit in their own teaching. Informal teacher leaders do not attain their leadership status through titles or compensation, therefor they must acquire respect when peers notice their hard work and proficiency at teaching, in addition to demonstrating certain dispositions that help them to be considered leaders among their colleagues. Informal teacher leaders embody more of a leadership stance, rather than a leadership title. When they combine their dispositions, expertise, an appreciation and desire to build collaborative relationships and an urge to have a positive impact on their community, they position themselves as potentially inhabiting their informal leadership stance. Teachers also demonstrated a nuanced understanding of their informal power and influence. They describe an inherent tension and interconnectedness that their leadership has with formal power structures and even their teacher colleagues.

**RQ 2: What motivates teachers who have taken on informal leadership roles to create these roles in the first place and how have they gained the skills that they need to exercise their leadership role?**

There are a variety of motivations that teachers have for pursuing leadership outside of the traditional hierarchy of their school. Their primary motivation is to become better teachers in order to help their students. Informal teacher leaders are also very community oriented and they have a desire to give back to their colleagues and the teaching profession by going beyond their classrooms with their expertise. They are inspired by other successful teachers and administrators and by their own friends and family. Most informal leaders do not gain their leadership skills through formal professional development experiences. They tend to acquire their skills in informal settings both inside and outside of their schools.

**RQ 3: What do informal teacher leaders consider to be the factors or conditions that encourage or discourage them from engaging in informal leadership?**

Interestingly, teachers in this study identified similar groups of people who both have the potential to encourage and discourage their leadership roles. For example, while families are often supportive of teachers who want to lead, they also can interfere with a teacher's leadership because most teachers prioritize their family time over their work. Teacher leadership is a time-consuming activity which forces some teachers to have to pull back on leadership activities in order to make time for other responsibilities. Colleagues and administrators had a strong impact on non-positional teacher leaders. Particularly, administrators who often control the conditions teacher leaders need in order to be successful such as time, resources and space to lead. Students were portrayed as only encouraging teacher leadership.

**RQ 4: According to informal teacher leaders, how do they exercise their leadership and what is their perspective on the impact of their leadership on their school communities?**

Due to the informal nature of their leadership, teachers reported unconventional ways of practicing their leadership. Non-positional teacher leaders cannot rely on their positional authority to achieve their goals, so they often rely on their strong relationships with colleagues and other community members to execute their action plans. Many factors impact the way that these teachers exercise their leadership and the process they followed was organic, depending on the circumstance. In every example given by participants, collaboration and shared leadership was an integral part of their process.

The perception among the participants in this study was that the work that informal teacher leaders do for their communities and the teaching profession is primarily positive. These positive effects can also be on the teacher leaders themselves. While engaging in teacher leadership can cause conflict with colleagues sometimes, it offers the teacher a chance to engage in exciting opportunities outside of their classrooms.

Chapter Five is devoted to explaining the findings found in Chapter Four in more detail. Connections to the literature will be made between these findings and the current scholarship on teacher leadership as well as other relevant bodies of literature. In addition, implications of this study's findings for teachers and administrators in primary, secondary and college settings are presented. Possible areas of further scholarship and research are also identified and explored.

# CHAPTER FIVE: SUMMARY, IMPLICATION, RECOMMENDATIONS, AND REFLECTIONS

Three years ago, I encountered a short article written by Barth in 2001 (the first year I began teaching) and a few simple words in that article led me to this study. In the article, Barth made a remarkable claim that if all students could learn, then all teachers could lead. To be completely honest, I did not really believe that was true. In many ways, I imagined myself a leader and I liked to think of my own skills as unique and not easily replicated. At the point in which I encountered this article, I was a well-respected teacher with 13-years of experience who resembled the teacher leaders I admired earlier in my career. I was bold in public and I was politically savvy whenever I had an idea I wanted to make happen. Barth's claim that all teachers could lead meant that I was not that unique after all. I sat with those words for a few weeks and as I went to work each day I challenged the idea by looking around at my colleagues. To my surprise, I began to understand that Barth was right. In nearly all of my colleagues, I saw their ability to lead. Each of them had their niche that inspired them to pursue a goal outside of their own classrooms. What I realized at that moment was that I had not recognized the potential of some of my colleagues because I had a very narrow definition of leadership.

Once I realized the potential for any teacher to lead, I knew that I would focus my dissertation on the concept of informal teacher leaders. I have read work from scholars all over the world who are studying teacher leadership; some even explore the concept of non-positional teacher leadership. After examining the existing literature, I set out to learn more about teacher leaders' understandings of the concept of informal teacher leadership, what motivates some teachers to take on informal leadership roles, what factors or conditions encourage or discourage this form of leadership and how might this form of leadership impact schools?

Chapter Five provides an opportunity to discuss the study's research questions and findings. There, I make connections between the study's findings and the existing literature, which helped me to formulate and explain the implications for current educational practices and scholarship. In addition, I explore recommendations for further research. Finally, I provide my own reflections on this study and consider its implications on my own practice and role as an educator.

## Study Summary

Based on my research questions, I designed a phenomenological study combining data from two instruments: a survey of over 100 educators in Massachusetts and one-hour interviews with ten informal teacher leaders. I was encouraged by the fact that so many teachers responded to my request for participation in the study. I was even more enthusiastic that teachers expressed an interested in the concept of informal teacher leadership. This dissertation has presented the results of my study on informal teacher leadership.

In Chapter One I provided an overview of the entire study and dissertation. It is also in this chapter that I explored my own positionality in relation to the study and underscored the limitations of the study. Chapter Two established that there is a substantial body of work devoted to teacher leadership and its potential in the field of education. However, scholars of teacher leadership have not devoted as much analysis on differentiating between formal and informal teacher leadership. Most of the literature is devoted to more formalized teacher leader roles. The literature review in Chapter Two substantiated that there was very little examination of informal teacher leadership, which led me to conclude that a study devoted to this topic could offer new information to the field.

Chapter Three was an explanation of the methods used to construct and conduct this study of informal leaders. I described the phenomenological method of qualitative research and the theoretical underpinnings I used in my study. In Chapter Three, I explained how the data from the survey and interviews were collected, organized and analyzed to reach my findings in Chapter Four.

Chapter Four is the heart of this dissertation. This chapter contained the analysis of the data and the themes that emerged from participants' responses to the survey and the interviews. The data presented led me to six findings and, ultimately, provided answers to the four research questions that guided the creation of this study. The six findings from Chapter Four are summarized as follows (a) Informal teachers are granted leadership status because of their adeptness as teachers and their ability to represent the needs of fellow educators and students (b) Informal teacher leaders are able to identify large and small problems to address and they are not afraid to take action to find a solution to those problems (c) Successful leveraging of relationship with stakeholders is at the core of a non-positional teacher leader's power (d) Informal teacher leaders gain their understanding of the power of informal leadership through indirect and informal methods (e) Non-positional teacher leaders are motivated by the desire to improve their teaching to help students and by their strong sense of community obligations (f) Informal leaders rely on their colleagues, especially formal leaders, to share power and allow them to operate as leaders within the school.

## Discussion of Findings

Chapter Five focuses on understanding the findings of Chapter Four in the context of the existing teacher leadership literature. In this section, existing scholarship illuminate themes within my findings. By choosing to organize the findings in a non-linear fashion, it is possible to

consider insights and implications for practice and examine connections between findings and the literature. In addition, I explore recommendations for further research. Finally, I provide my own reflections on this study and consider its implications for my own practice and role as an educator.

**Informal Teacher Leadership as a Complex Stance**

Informal teacher leadership is a complex stance that allows teachers to lead without any formal recognition of their status. Informal teacher leaders are deeply respected and trusted by their colleagues, which is most likely what allows them to initiate action plans and motivate their colleagues to help them. Trust between colleagues is well documented to be an essential component in building strong relationships and productive work among teachers (Cross and Parker, 2004; City, Elmore, Fairman & Teitel, 2009; Bryk, 2009). Finding One demonstrates that teachers who were identified as teacher leaders by their colleagues all shared certain characteristics that led their peers to trust their judgement and motivated colleagues to follow their leadership.

Experience and credibility based on a record as a strong teacher is the most essential of these qualities. As one participant put it in his description of a colleague, her "literary chops" are what earned her respect and status as a teacher leader. Teacher leader scholarship supports the premise of the expert teacher as leader, by emphasizing that teacher leaders emerge only if they are considered experts in their field (Riveros, 2013; Fairman and Mackenzie, 2015; Hatch, Eiler White, & Faigenbaum, 2005; Hunzicker 2017). Collinson (2012) went as far as to state, "If teachers cannot sustain success as leaders without first modeling pedagogical excellence (Odell 1997, Crowther 2009), one could reasonably argue that the first priority toward cultivating a deep leadership pool (teachers and administrators) would focus on developing pedagogical

expertise." This concept of expertise being fundamental to leadership is not limited to literature in the field of education. Larsson, Segersteen, & Svensson (2010) also found that informal leaders in the business sector rely on their expertise to gain leadership status. They use their expertise to speak clearly about their goals and earn the respect and trust of their peers.

Teacher leaders are not just long term, excellent practitioners, they also possess a combination of qualities that serve them well when they decide to lead. This study identified some of those qualities as being passionate, right-minded, bold and inviting to their colleagues. The qualities derived from the data in this study align well with other studies of both informal and formal teacher leaders. Carver's (2016) study of a teacher leadership program resulted in the following conclusion: "The traits or characteristics of teacher leadership referenced by participants fell into four primary categories: (a) openness to risk-taking, (b) commitment to lifelong learning, (c) willingness to be a team player, and (d) passion for making a difference." Similarly, Fairman and Mackenzie (2015) found that all teacher leaders demonstrated "openness," "courage," and the ability to "establish trust" with their colleagues. Hunzicker (2017) supported these findings by demonstrating that years of experience were essential to being an effective teacher leader; teacher leaders needed to be able to move from private spaces to public spaces with their ideas, a trait I call "boldness" in my study. Hunzicker's research also mirrors the themes in Finding Three, in which I found that the teacher leaders I interviewed all used a process of collaboration and leveraging their collegial relationships which eventually led them to widen their spheres of influence when acting as teacher leaders. Acker-Hocevar & Touchton (1999) also found that teachers who were most able to practice agency in their schools were adept at using their personal relationships with colleagues to exert their influence.

When examining Finding One in the context of other scholarly works and in conjunction with other findings, it's clear that the qualities these teacher leaders possess are not just characteristics; instead, these teachers have a particular combination of qualities and a leadership stance that promotes their leadership actions. Finding Two demonstrates that informal teacher leaders are motivated to take action to solve both local and global problems. Finding Three proves that teacher leaders are inherently collaborative and value their professional relationships; they are devoted to finding solutions to problems with the help of their colleagues. In Finding Three, I outlined the factors that are present for a teacher leader to potentially inhabit their leadership stance. The wording "potentially" is used intentionally to demonstrate the voluntary nature of informal teacher leadership. Teachers are not forced to become informal leaders, they can choose to be a leader, if they are motivated to do so. Findings One, Two and Three work together to portray non-positional teacher leadership as a stance that any teacher could decide to adopt. The concept of informal leadership as voluntary is supported in the works of Collinson (2012), Danielson (2006) and Gronn (2000). Gronn wrote that in distributive leadership there is no need for everyone to lead all of the time. According to Gronn, leaders can emerge and recede depending on the tasks required. There is no need for teachers to lead all of the time, they can lead when the factors and conditions are in place to make their leadership valuable and rewarding. These findings, along with the existing research suggests that all teachers should consider exploring their ability to contribute to the leadership of their schools.

Findings Two and Three, in combination with the dispositions identified in Finding One, also strengthen the recent claims from scholars who believe that teacher leadership is not just a list of qualities a teacher possesses, but more of a complex positionality of being "more than just a teacher" (Hunzicker, 2016). Smulyan (2016) describes teacher leadership as a stance, or "way

of being," rather than a list of qualities. She explains that teacher leadership is an organic quality in all teachers that comes to life when a teacher is moved to action. Teachers who adopt this stance believe (a) that the teaching profession gives them opportunities to grow; (b) teaching is a political act that includes a desire to foster democratic values and social justice, and (c) teaching is inherently collaborative across teachers, schools and other networks. She goes on: "To me this means that a teacher who sees herself as a teacher leader has a unique view that is both deeply local and broadly political." Carver (2016) also writes about informal teacher leadership as a stance that is based on, "exerting influence based on credibility and trustworthiness, not power and authority." Hunzicker (2017) offered some insight into the theory of teacher leadership as a stance, "comprised of dispositions; teacher leadership actions emerge from a teacher leadership stance." She went on to write that these teachers are intrinsically motivated to lead due to their leadership stance, and that is reflected in Finding Five of this study which demonstrates that the participants believed that informal teacher leaders were personally moved to lead based on their desire to help students and colleagues. Significantly, she states: "Because teacher leadership is a stance, or way of thinking and being, the decision to lead or not to lead ultimately lies within the power of teachers themselves, even when faced with obstacles such as an undesirable school culture, an unsupportive building principal, or resistant colleagues."

Understanding these connections leads to a more nuanced portrait of informal teacher leadership that cannot simply be defined as a set of characteristics. While all teacher leaders seem to possess a certain set of qualities, these qualities are not what necessarily make them leaders. It is possible that the qualities that these teachers possess help to build trust with their colleagues and give them the credibility to be accepted as leaders. However, these

characteristics seem to be combined with a desire to solve problems and work with colleagues, thereby creating a leadership stance that does not rely on authoritarian power to achieve goals.

Ultimately, the findings of this study, along with recent scholarship point to a new "wave" or understanding of teacher leadership. Informal teacher leadership is inherently democratic and is grounded in the notion that leadership is not reserved exclusively for those who are appointed leaders and hold official power. While school leaders are often identified by their job titles, they are by no means the only leaders in the school. The participants in this study demonstrated that there are multiple ways to acquire a leadership stance and in the case of informal leaders, their leadership status is derived from a complex combination of factors which result in those around them granting them the ability to influence and hold power within their community. Non-positional teacher leaders inspire people to support them of their own free will (Huang, 2016). Their unique stance attracts followers and provides them with an authority that is rooted in democratic principles.

**More Space to Learn about Teacher Leadership and Time to Reflect**

Finding Four validates the position that non-positional teacher leaders find informal and unplanned methods of understanding and reflecting on their leadership. Only one participant specifically attended a formal workshop on the topic of teacher leadership. In fact, she reported to me that her sole reason for responding to the survey and subsequently agreeing to the interview was because she felt that it was important that she help anyone trying to do more research on this topic. Subsequently, my analysis of the literature leads me to surmise that based on her description of the institute, it is likely that the institute she described in her interview is the same program that Smulyan (2016) wrote about to define teacher leadership as a stance.

It is encouraging to know that with little-to-no formal training, informal teacher leadership can exist and thrive in any school. As Finding Four demonstrates, teachers in this study learned to lead without any formal training or education on the concept of leadership. For example, teachers learned by observing fellow teacher leaders or through informal mentorship and encouragement from colleagues, friends and family. Some of the teachers in this study also practiced their leadership skills outside of school, as the heads of their families or in other communities they are a part of. However, many teachers do not recognize their own leadership potential, which limits the ability of all teachers to see themselves as leaders (Poekert, Alexandrou, & Shannon, 2016). Some scholars have raised credible concerns about the benefits of encouraging teachers to adopt leadership as a term that applies to their work. Fitzgerald and Gunter (2008) warn, "of concern is that this [labeling teachers as leaders] is simply a modernized way to seduce teachers to take on additional tasks and responsibilities without the commensurate increase in their salary or time allowance. This point is rarely debated in the leadership literature, possibly because to say this is deeply heretical." Teachers do not necessarily even agree that what they are doing is leadership (Hanuscin, Rebello, & Sinha, 2012); in fact, a few of my participants raised the question in the interview and survey by claiming that the behaviors I described was simply what any competent teacher would do.

It is important to consider these questions while also reflecting on what scholars who have focused on teacher leadership professional development have found in their research. Frost (2012) posits that encouraging non-positional teacher leaders to create and deliver professional development would lead to more buy-in from colleagues and more innovation in schools. Hanuscin, Rebello, & Sinha's (2012) study of a how informal teacher leadership played a role in reforming a ninth-grade physics curriculum in a variety of schools found that there is a

disconnect between how teachers understand leadership and how the literature defines it, which led them to develop professional opportunities that focused on bridging the gap between the two. By the end of the workshops, teachers were more confident in defining informal leadership behaviors as leadership, where before they believed that the only legitimate form of leadership was formal. Poekert, Alexandrou, & Shannon's (2016) work points to the need to provide teachers with training in teacher leadership. They wrote, "whether or not the teachers are formal or informal leaders within their schools, what is most essential is that they take a leadership stance that is responsive to the needs of their students and motivates their colleagues toward improving their performance." They believe that teachers who are able to learn how to lead within their own contexts can be an asset to their schools. Huang (2016) asserts that all teacher education needs to include some content on teacher leadership so that teachers can learn how to take agency and lead when they are moved to do so. While this might not be possible in the first few years of teaching, it is something that all teachers have the potential to learn. According to Hunzicker (2017) and Smulyan (2016) teachers want and need the time and space to reflect on their leadership potential and to grow into their leadership stance. Pucella (2014), concluded that teachers need to be familiar with the "language of leadership" as a way to empower teachers and that most pre-service programs could easily adjust their curriculum to include teacher leadership.

Professional development is essential to helping teachers continually grow and hone their practice as they continue on in their career. There is an abundance of literature that suggests that teacher leadership is usually a positive outcome for schools and yet, there is very little evidence that teachers receive any educational opportunities regarding teacher leadership. There is not necessarily the need for schools to train teachers in leadership. Finding Four supports the claim that teachers are not often exposed to the language of leadership and Finding Six outlined a need

for more space and time for teachers to reflect on their ability to lead. While there will undoubtedly continue to be informal teacher leaders with or without more organized and specific professional development devoted to leadership, there is sufficient evidence to suggest that teachers who have already adopted a leadership stance could benefit from understanding and reflecting on their actions as leaders. In addition, new teachers or teachers who do not occupy a leadership stance could potentially benefit from understanding how they might lead on issues that matter to them if they were more aware of their own latent powers to lead. While the title of "leader" may be a contentious and a somewhat controversial label for some teachers and scholars, the leadership behaviors that teachers exhibit should be the focus of any professional development that is offered. It is less important to focus training teachers to accept the label of leader, but rather to understand the power of their actions to affect positive change within and outside of their schools.

**Positive Implications of Informal Teacher Leadership**

Many of the findings in this study, especially Findings Two, Three and Five, suggest that informal teacher leadership has a predominately positive effect on the education system. Finding Two outlined a host of problems and issues that teacher leaders actively seek to address. All of these offered positive benefits to students and teachers in their schools. Finding Three demonstrated that teachers who exhibit informal leadership behaviors work well with their colleagues and rely heavily on a commitment to collaboration to achieve their goals. This finding also includes evidence that reinforces a dominant theme in the study which was that teacher leadership was overwhelmingly positive for the individual teachers and the communities they served. Finding Five illustrates that the participants in this study were motivated to lead because they wanted to give back to their colleagues and to the teaching profession. In addition, they

were primarily moved to lead to improve the education of their students and to make a positive impact on society as a whole.

Much of the literature on teacher leadership acknowledges that there is a tension between teachers who lead and some teachers who feel threatened by those actions. Inherent in informal teacher leadership is the idea that the teacher leading is at the same level as their fellow teachers (Poekert, Alexandrou, & Shannon, 2016), but sometimes their leadership is a perceived threat to colleagues who believe that the teacher leader might increase institutional expectations of teacher engagement (Blengen & Kennedy, 2000). Childs-Bowen, Moller, & Scrivner (2000) warned principals that praising teacher leaders in public could subject the teacher to unwanted attention from their peers. Teacher leaders sometimes expressed that their actions complicate their relationship with some colleagues (Harris, 2005). Poekert et al. (2016) recognize this tension but added that, "for some teachers, challenges also presented a productive tension, rather than a barrier, contributing to the development of persistence and stamina when addressing dilemmas." It is important to acknowledge that not all teachers will agree that teacher leadership is a positive phenomenon and while earlier literature on the subject noted unions as barriers to teacher leadership (Barth, 2001), there is evidence to suggest that unions are beginning to express interest in the concept (Bangs & Frost, 2015).

With these concerns in mind, the literature and findings of this study suggest that teacher leaders have generally positive impacts on their schools and the teaching profession. These teachers want to improve their schools in every way imaginable (Muijs & Harris, 2003). Findings Two and Three of this study show the potential of teachers to address everything from a small problem impacting a limited number of people within one school to much larger global problems that impact individuals both inside and outside of their schools. Several small-scale

studies have hinted at the idea that teacher leadership has a positive influence on student achievement (Pounder, 2006), and teachers in this study believed their leadership did have a directly positive impact on their students and colleagues. Teachers and scholars agree that teacher leadership has the largest impact on the teacher leaders themselves. Engaging in leadership behaviors gives teachers a sense of purpose outside of their classrooms and makes them energized and accomplished in their role as a teacher (Muijs & Harris, 2006; Wenner & Campbell, 2017). It combats the feeling that teaching is a "flat profession" (Danielson, 2006).

Many of the teachers in this study were committed to large scale goals that reached far beyond their classrooms. The science teacher who constructed a beehive observation in her classroom believed that her work was connected to teaching her students about sustainability and environmentally sound practices that they could carry with them well beyond their high school experience. The English teacher who intervened to change a summer reading book believed he was acting on his commitment to combat racism within his community, thereby teaching the students at his school how to continue to fight racism beyond their high school career. The middle school teacher who organized a regional conference of geography teachers wanted to be able to influence teachers across her region to teach cultural competence to all of their students. The actions of these teachers align with the findings of Fitzgerald & Gunter, (2008) who observed that informal teacher leaders, "are in control of their work with an agenda to not only work for the children in their immediate care but also as having a wider social justice imperative." Smulyan (2016) wrote that the teachers in her study also understood their leadership was a political act closely linked to social justice and civic engagement. Wenner and Campbell's (2017) recent literature review added that since the comprehensive literature review

from York-Barr and Duke (2004), there have been more scholars intersecting teacher leadership with social justice work and culturally proficient leadership.

Teacher collaboration is one of the most powerful impacts of informal teacher leadership. Finding One demonstrates that one of the essential dispositions of an informal teacher leader is that they are inviting to their colleagues. Finding Three clearly showed that teachers who wanted to achieve a goal used their ability to work closely with their colleagues in both private and public spheres. Huang (2016) noted that teacher leaders were most creative in their private spheres; they relied on these private connections with colleagues to help bolster their leadership behaviors before they stepped in to more public settings. Finding Five reveals informal teacher leaders expressed a strong and sincere desire to give back to their colleagues. Their sense of obligation to their teaching communities included both their schools and the larger profession. For example, two participants participated in national and international conferences to share their expertise with more educators outside of their schools. Wenner and Campbell (2017) established in their literature review that there is strong evidence to suggest that teacher leaders do have a positive impact on their colleagues. In fact, it is specifically because of their commitment to helping and working with other teachers that informal leadership is successful.

The principal characteristic of teacher leadership, as described here, is that it is completely informal. As Danielson (2006) explained,

> Teacher leaders don't gain their authority through an assigned role or position; rather, *they earn it through their work with both their students and their colleagues*. Teacher leaders play a highly significant role in the work of the school and in school improvement efforts. Precisely because of its informal and voluntary nature, teacher leadership represents the highest level of professionalism. Teacher leaders are not being paid to do

> their work; they go the extra mile out of a commitment to the students they serve (emphasis added).

Danielson supports the idea that informal teacher leadership offer a unique form of leadership that is propelled by a desire to help students and colleagues. These teachers want to improve their schools and improve the teaching profession, which is likely why they have a largely positive impact on their schools and the teaching profession.

**Synergy with Formal Leaders**

Informal teacher leaders often operate outside of the accepted leadership hierarchy in their schools; however, they still rely on formal leaders to help them reach their goals. In Finding Six of this study, participants reported that their leadership behaviors were not connected to a desire to attain a more formalized leadership role. They did not think of their informal leadership as a path to becoming an administrator. Fairman and Mackenzie (2015) found this to be true in their own study of informal teacher leaders and reported that these teacher "actively resisted" making their roles more formal. The teachers they interviewed believed that, "informal leadership had greater potential than formal leadership to influence improvement in teaching and student learning. Aileen, an English teacher and member of her school leadership team at Drummond High School described the team this way: 'Formal leaders are considered leaders because of the positions they hold and may or may not be effective. Informal leaders, while they may not hold a defined leadership position, are always effective'." Fairman and Mackenzie concluded that teacher leaders were fearful of being considered part of the hierarchy precisely because it would change their relationship to their colleagues and potentially delegitimize their leadership. This study, along with the work of these scholars, help to shape a clearer picture of how teacher leaders understand their own power and influence. To informal teacher leaders,

their power is derived from their equal and trusting status with colleagues. While non-positional leaders resist becoming more formal leaders, they still rely on administrators to help move their ideas forward and do seek to have formal leaders as partners.

Findings Three, Five and Six all demonstrate the many benefits of non-positional teacher leadership including collaboration and the strong focus on issues that directly impact students and colleagues. In order to maximize the benefits of teacher leadership, formal leaders should foster this type of leadership whenever possible. Finding Six made clear that informal leaders rely on formal leaders to support their diverse work. Teachers reported that formal leaders are at the core of informal leadership because when an administrator encourages a teacher to act on a plan, it often motivates the teacher to actualize their leadership potential. As well, school administrators control many of the conditions, such as time, space and resources that can encourage leadership behavior in teachers. Finding Six is strongly supported by the literature. Birky, Shelton & Headley's (2006) wrote a compelling article encouraging administrators to harness and foster teacher leadership in their schools for a number of reasons. As they pointed out, it is common knowledge that teachers have a direct impact on student achievement, and many studies show that administrators have a direct impact on teacher performance; therefore, encouraging teachers to be effective and passionate is one way for principals to positively impact student learning. Birky et al. also found that teacher leaders are motivated by positive encouragement by their administrators who, therefore, have a large impact on the potential of teachers demonstrating leadership behaviors. This directly connects to my findings in which participants reported that they were more likely to act as leaders when their administrators encouraged them. Wenner & Campbell's (2017) most recent literature review notes that

administrative support is one of the primary conditions that scholars cite as being necessary to growing teacher leadership in schools.

Data relating to Findings Five and Six included many instances when teachers not only desired encouragement from their administrators to share leadership, but also support a need for practical elements such as time, resources and space to operate as informal leaders. In a study of teacher leadership in ten Lebanese private schools, Ghamrawi (2013) found very similar trends. Those teachers identified time as their primary need for practicing leadership. Poekert, Alexandrou, & Shannon (2016) reported that the most cited barrier to teacher leadership was a lack of time during the school day. Participants in my study reported that their leadership often forced them to work outside of their contractual hours. Smulyan (2016) concluded that teachers require more time and space to support their growth in teacher leadership and to reflect on their work. Beachum and Dentith's, 2004 study found that teacher leaders were more likely to be present in schools where resources were made available to teachers and when the administrators valued their work by helping to provide those outside resources. Interestingly, Collinson (2012) proposed that teacher leaders would be drawn to schools with more resources because the resources would provide the means for following through on intentions as teacher leaders.

Formal leaders should be willing to create a space for informal leadership which relates directly to more democratic and shared forms of leadership. As indicated in Finding Six, some participants reported that their administrators did not show any interest in sharing leadership, which discouraged them from pursuing leadership on important issues. Blengen and Kennedy (2000) claimed that in order for schools to teach students how to operate in a democratic society, school leadership should model democratic values by sharing power between teachers and administrators. Hunzicker (2017) reported that if a school's culture and hierarchy was overly

rigid, it was less likely that teacher leadership would develop. Birky, Shelton, and Headley (2006) also reported that administrators who "withheld, controlled, or limited power from teachers" would make it more difficult to empower teachers to lead. These claims were supported by Finding Six, and it should also be noted that participants in this study demonstrated an ability to overcome barriers placed by some administrators. Informal teacher leaders understood how to leverage their relationships with formal leaders in order to achieve their goals. When asked who or what stood as an obstacle to teacher leadership, Participant B pointed out that "no one is an obstacle, merely a hinderance" when referring to certain administrators. Participant G reported that she was willing to be "subversive" and risk being in trouble with her administrators if she felt that the goal was to better her school community, especially students. These responses stand as examples of how informal teacher leaders are not afraid to challenge formal leaders when they feel it is necessary, however, Finding Six clearly demonstrated that teacher leaders value working in harmony with their formal leaders.

Shared forms of leadership help not only the informal teacher leaders, but also helps the formal leaders by creating a wealth of professionals who are invested in the school and its success. In my study, teachers reported that when administrators supported their leadership, they were willing to go above and beyond routine responsibilities and expectations with a variety of projects that directly impacted students or colleagues. Nappi (2014) theorized that when formal leaders make space for teacher leadership to flourish, they are setting up a legacy of leadership that will potentially stabilize leadership in the school well beyond when the formal leader leaves. A culture of more democratic leadership can develop, and teachers will continue to fill the space provided to them to lead. Nappi referred to this as a "legacy of shared leadership." It is therefore beneficial not only to the informal teacher leader but also to the formal leader to work

collaboratively together. There is a reciprocity between the formal and informal leaders that makes the existence of informal teacher leadership not only helpful to their teacher colleagues and students, but to their administrators as well (Beachum & Dentith, 2004; Leithwood, Mascall, Strauss, Sacks, Memon, & Yashkina, 2007).

Childs-Bowen, Moller, and Scrivner's (2000) work pointed out that principals are the key to providing quality professional development that connects to Finding Four in this study and ties nicely together with Finding Six. Formal leaders such as department chairs, principals and superintendents are the educators who have the power to prioritize funds (Ghamrawi, 2013). As Finding Four demonstrates, there is clearly a lack of opportunities for teachers to learn about teacher leadership, to reflect on their practice as leaders, and grow as leaders within their schools. Interestingly, Frost (2012) offered teacher leadership as a solution to "contrived" professional development, which is often just a dissemination of information. He recommended "non-positional leadership" as a more authentic and egalitarian approach to professional development. For any of this to be possible, those with the formal power to make decisions must believe in the value of teacher leadership and be willing to share power. Participants in this study felt strongly that when their formal leaders supported their work and their ability to exercise leadership, they were motivated to inhabit informal leadership roles. Pearce (2004), wrote that shared leadership has many benefits, but that ultimately it is up to the formal leader to commit to sharing their power with others in order for everyone in the organization to reap the rewards. When Finding Four is considered in conjunction with Finding Six, high quality professional development in the area of teacher leadership should become a priority. Of course, this professional learning for faculty will require time, resources, and space, which formal leaders can provide.

## Implications for Practitioners and Scholarship

### Limitations

Before considering what implications these findings have for both practitioners and scholars, it is necessary to reiterate the limitations of this study. In order to answer the four questions in this study, I used a small sample size of educators. This study is also not long-ranging in time. All of the data was collected in the span of three months and does not represent any change over time. The teachers who participated in this study were mostly white women, reflecting the national trend in teacher demographics. It is very important to also consider the fact that the educators who participated in this study were labeled as informal teacher leaders because of the self-reported behaviors they identified in the survey. The focus of this study was on how teachers experienced the phenomenon of informal teacher leadership, therefor, colleagues and other stakeholders such as students or parents were not asked to participate in the study. While these limitations are important to keep in mind, this study still provides some valuable insights into informal teacher leadership and possible implications for both current educators and scholars in the field.

### Implications for Practitioners

**Teachers.** Informal teacher leadership is a unique, powerful and dynamic form of leadership that can be practiced by any educator. While it is helpful for formal leaders to support informal teacher leadership, non-positional leadership does not necessitate permission from any source and can be pursued by any educator. Based on this study, I would encourage teachers to expand their own definition of leadership to include non-positional leadership. Some scholars have found that once teachers are exposed to a more expanded definition of leadership, they begin to feel more empowered to act outside of their classroom and begin sharing power with the

formal leaders of their schools (Wilson, 1993; Donaldson, 2007; Hanuscin, Rebello, & Sinha, 2012; Smulyan, 2016; Wenner & Campbell, 2017).

While teachers might not have a formal title, that should not discourage them from taking the lead on an issue that they are passionate about. All teachers should consider exploring their ability to inhabit an informal teacher leadership stance. This study, along with supporting literature, suggests that informal teacher leaders do not need to lead at all times and that there are multiple benefits to teacher leadership (Wenner & Campbell, 2017). Non-positional leadership is inherently flexible and allows for teacher to step into and out of the role as they see fit. Teacher who wish to inhabit a leadership role should keep in mind that they must remain attuned to their colleagues and work very closely with fellow teachers and other community members to craft an action plan. Their power as an informal leader is derived from the trust that their colleagues have in them. As one participant in this study pointed out, some teacher may believe themselves leaders, but if their colleagues do not respect and trust their leadership, they are not granted any power to lead. With experience, strong relationships with colleagues and teaching expertise, all teachers can potentially find a space in their school to lead.

Teachers should embrace their potential power to lead, while also remaining cautious about administrators willing to relegate managerial duties to them, tasks that are neither fulfilling or compensated (Lindahl, 2008; Fitzgerald & Gunter, 2008; Margolis & Huggins, 2012). The power of informal teacher leadership is that the leadership originates from the teacher rather than an outside source (Bangs and Frost, 2015). This intrinsic motivation propels creative and dynamic ideas that naturally draw in many members of the community and encourages collaboration. It is not necessary for informal teacher leaders to always inhabit their leadership. My study suggests that there are many obstacles to informal leadership including time

constraints, however, this form of leadership is fluid. Gronn (2000) points out that leaders can emerge and recede depending on the tasks and their motivation. Muji and Harris (2006) believe that one of the strengths of informal teacher leadership is that teachers can lead at different times and move in and out of the role. All teachers can lead at their pace and with their own passions in mind, making this form of leadership uniquely flexible.

**Administrators**. Formal leaders have the ability to support and encourage informal teacher leadership. They are well positioned to provide the necessary time, resources and space for teachers to occupy a leadership role in schools. Administrators should be motivated to support informal teacher leadership because these teachers add value to any school community. When a teacher steps into a non-positional leadership role, it is usually because of an issue that they feel passionate about and that has positive implications for both students and, many times, colleagues. In addition, supporting teacher leadership helps to keep teachers committed to their school community and it can rejuvenate their feeling of excitement and passion for teaching. First, administrators must be willing to adopt a shared leadership stance in which they are able to trust teachers to act as leadership partners, not competitors. They must also be willing to direct resources to helping teachers realize their leadership potential. One of the best ways of doing this is by supporting robust professional development on topics that encourage teacher leadership behaviors. Most importantly, administrators who wish to support a shared leadership model must work to dismantle the expected hierarchy of leadership. This is no simple task. It requires formal leaders to reframe traditionally recognized sources of power through their own actions and to contest the very framework that grants administrators their officially sanctioned power. Publicly and privately supporting informal teacher leaders is one step in creating a more democratic leadership structure in schools.

**Implications for Policy Makers**

There is evidence that the concept teacher leadership has made its way well beyond theory and practice. Teacher leadership now appears in many national and international standards for the teaching profession (Nappi, 2014; Frost, 2012; Wenner and Campbell, 2016). The codification of teacher leadership standards is encouraging in that educational policy makers recognize that there is a power in this form of leadership and that it should be encouraged in teachers. However, policy makers should also be weary of trying to define teacher leadership or the pathways for achieving it. This study, along with enumerable scholarly works on the topic have demonstrated that it is very difficult to arrive at one definition of teacher leadership. If a teacher is given a leadership title with defined roles, it is easier to delineate how that teacher should behave as a leader. The power of informal teacher leadership is that there are no set or defined roles. Informal leadership is organic and cannot be reduced to a list of standards. Policy makers should resist the urge to over standardize a model of teacher leadership. By creating standards of teacher leadership, the definition of what is considered leadership is narrowed (Frost, 2012). It is important to acknowledge the power of teacher leadership, while continuing to create standards that reflect a wide-range of patterns and behaviors that can constitute leadership in teachers. This is especially important to consider because many preservice education programs base their curriculum on these types of standards. Policy makers should consider how encouraging informal teacher leadership could be meaningfully integrated into school review procedures and accountability processes, without trying to narrowly define this type of leadership.

**Implications for Pre-Service Education Programs**

There is much evidence to suggest that teachers should learn about teacher leadership concepts in their preservice education programs. Although many of the behaviors associated with teacher leadership are taught in teacher preparation programs across the world, it is important for preservice teachers to understand that these behaviors are legitimate and powerful forms of leadership (Suranna & Moss, 1999; Bond, 2011; Pucella, 2014; Huang, 2016). This exposure to an expanded concept of leadership beyond the traditional hierarchy can help teachers as they begin to gain expertise and experience throughout their career and equip them to lead when they feel moved to do so. Future administrators who will have the power to support shared forms of leadership go through the same preservice programs as teachers; they should also be exposed to these concepts early on in their professional training and education to gain a deeper understanding of democratic forms of leadership.

**Implications for Future Research**

There is a robust body of literature that is devoted to teacher leadership. When coupled with the literature on shared leadership, there are already many studies that point to the benefits of teacher leadership. This study has added to the relatively small collection of articles and studies about informal teacher leadership, specifically. There is a need to investigate further the implications of differentiating formal teacher leadership from informal teacher leadership. This study has left me with many more questions that would be worthy to pursue in the future. There are two demographic features that I did not investigate in my own study, but that I think would offer new insights into the field. Further research is needed to determine what impact gender and race might play on teachers' abilities to act as leaders within their schools. I did not come across any studies that looked specifically at race or gender and how those factors might intersect with

teacher leadership. Knowing that the formal leadership positions are disproportionately held by men and white educators (Hill, Ottem & Deroche, 2016), it begs the question of whether informal teacher leadership is a role that is open to more educators regardless of race or gender.

With more time and resources, I would have liked to have investigated if the informal teacher leaders who participated in my study were perceived to be leaders in their schools. Very few studies compare self-perception of leadership with the perceptions of colleagues. In addition to understanding if colleagues consider certain teachers informal leaders, it would be helpful to understand if students are aware of teacher leadership. Not only are student aware of teacher leadership, but do they feel any effects of this form of leadership on their own experiences? Do students in schools with more teacher leadership learn from this more democratic style of leadership and does this have an impact on their academic or civic engagement? My study did find evidence that informal teacher leaders do not limit their activity to their immediate spheres of interaction with students and colleagues, but further inquiry is needed to understand how teacher leaders interact with parents and other community members. I would like to add my voice to York-Barr and Duke (2004) and Wenner and Campbell (2016) who all call for studies with a larger sample size conducted over a longer range of time. Most of the studies on teacher leadership have been smaller scale. Studies with a broader scope are especially necessary in the area of understanding the connections between teacher leadership and student achievement.

## Personal Reflections

As I wrote in the beginning of this chapter, my journey to writing this dissertation was one which really challenged my own perceptions of what a leader is or can be. My time teaching in a democratic school program (School Within A School or SWS) has reshaped my thinking on so many levels. When I walk into my classroom, I know that the students are willing partners in

their learning experience. They expect me to include them in making many of the decisions in our classroom. My first year in SWS was a very difficult transition because one of the things I liked most about teaching was being in charge. I was offended when the students would question a decision I made, and I sometimes would act defensively. At the same time, I knew that democracy was almost always a better solution than a hierarchical form of leadership. Over time, I grew much more comfortable and confident about sharing my power with my students, some of whom were only 15 years old. Their participation in our shared experience transformed my teaching for the better and I cannot imagine going back to a teacher-centered model. I believe that all of my students bring some sort of expertise and skill that they can share with all of us and that they have the power to teach us and contribute to our collective education. Surely, if a 15-year-old can lead a class of peers and their teacher, then Barth (2001) must be correct that all teachers can lead as well.

During the 12 years I have been at my current school, we have had four principals. While this has felt a bit unsettling at times, the school continues to operate smoothly. I am certain that one of the reasons that our school has been able to weather these upheavals in leadership is because the teachers have remained as steadfast leaders of our school in their own right. They continue to uphold and improve our school culture and the education of our students. It is through their leadership that our new principals learn how to co-lead our school community.

Researching and writing this dissertation has been one of the most difficult things I have ever done. Yet, each time I sat down to read a journal article, interview a participant, analyze data or write a page of this dissertation, I have felt deeply and personally connected to and invested in what I was researching on a personal level. In fact, my notes on many journal articles and books contain comments in all capital letters expressing my excitement upon reading

something that I had experienced in my own career. These were often followed by three or four exclamation points. I look back on these notes and realize that each time I read about teachers being empowered to lead, I was thrilled to encounter information that legitimized my own experiences and those of my colleagues.

One of the hardest tasks in conducting this study was not turning my interviews into a rap session with teachers about how my own experiences connected or differed from theirs. I felt a rush of adrenaline after reading my survey results for the first time or ending an interview with a participant. I would immediately write down all of my thoughts to separate out my personal thoughts and feelings. Many people ask me if I am tired of reading and writing about my dissertation topic because I have been working on it for multiple years, and to my own surprise, the answer is no.

I believe that this dissertation is a validation of the hard work that all teachers put into their schools on a daily basis. It may be controversial to call their work "leadership" when there is not an official title attached to their behaviors, but I think the designation is absolutely necessary. This work has taught me that it is critical that teachers understand that they all have the potential power to lead and that there is no one definition of leadership. I am especially struck by how this simple concept can empower any teacher, in any subject, in any school in the world, to take action on something that matters, whether big or small. While most schools operate within a hierarchical model of leadership, it is not necessary for teachers to wait for their formal leaders to give them permission to lead. Any teacher has the power to try and take action. Informal teacher leadership is a collaborative and flexible style of leadership that can make a positive difference in life of the teacher, her colleagues, and perhaps most importantly, her students.

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# APPENDICES

## Appendix A

Survey Instrument

The purpose of this 10-15-minute survey is to learn more about teacher leadership in middle and high school settings. Data from the survey will be used for scholarly research aimed at fulfilling a Ph.D. requirement at Lesley University in Educational Leadership. There are no direct benefits or drawbacks to taking this survey. Participation in this survey is completely voluntary and you can stop taking the survey at any point in the process. In addition, you may choose to skip questions in the survey that you do not want to answer. Any questions regarding this survey can be directed to the researcher, Jennifer Martin via email at jmarti36@lesley.edu and/or the researcher's faculty advisor, Dr. Paul Naso, at pnaso@lesley.edu. Your responses will be kept strictly confidential, and digital data will be stored in secure computer files. Any report of this research that is made available to the public will not include your name or any other individual information by which you or your school could be identified. There is a Standing Committee for Human Subjects in Research at Lesley University to which complaints or problems concerning any research project may, and should, be reported if they arise. Contact the Committee Chairperson at irb@lesley.edu. Please feel free to print a copy of this consent page to keep for your records.

1. Clicking the "yes" button below indicates that you consent to having the data from this survey used in my research on teacher leadership.

- ❍ Yes, I understand that my participation is voluntary and that data from this survey will be used for scholarly research on teacher leaders. (1)
- ❍ No, I would not like to participate in this survey. (2)

2. Current teaching environment

- ❍ Middle School (6-8 grade) (1)
- ❍ Junior High (7-9 grade) (2)
- ❍ High School (9-12 grade) (3)

3. How many years have you taught?

- ❍ 1-3 (1)
- ❍ 4-9 (2)
- ❍ 10-20 (3)
- ❍ More than 20 years (4)

4. What is the highest degree or level of education you have completed?

- ❍ Bachelor's degree (1)
- ❍ Master's degree (2)
- ❍ Master's degree +15 graduate credits (3)
- ❍ Master's degree +30 graduate credits (4)
- ❍ Master's degree +45 graduate credits (5)
- ❍ Doctorate degree (6)

5. Please specify your gender

- ❍ Male (1)
- ❍ Female (2)
- ❍ Gender nonconforming (3)

6. Please specify your ethnicity and/or race

- ❍ White (1)
- ❍ Black or African American (2)
- ❍ American Indian or Alaska Native (3)
- ❍ Asian (4)
- ❍ Native Hawaiian or Pacific Islander (5)
- ❍ Other (6) _____

7. How many formal teacher leadership positions have you held in your teaching career? In this case, formal denotes any position in which you have or had an official title (e.g. teacher leader,

mentor, coordinator, educational coach, facilitator, department chair, and/or advisor) to identify a specialized responsibility or task performed with or for colleagues. Formal leadership positions also include positions in which you had or have a title and/or received time-release and/or compensation for work completed outside of your typical teaching responsibilities with or for colleagues.

- ❍ 0 formal teacher leadership positions (1)
- ❍ 1-2 formal teacher leadership positions (2)
- ❍ 2-3 formal teacher leadership positions (3)
- ❍ 4-5 formal teacher leadership positions (4)
- ❍ More than 5 formal teacher leadership positions (5)

8. Do you currently hold a formal leadership position of any kind, including an administrative role or formal teacher leader role (as defined in the previous question)?

- ❍ Yes, I currently hold a position as an administrator in my school. (1)
- ❍ Yes, I currently hold a position as a formal teacher leader as part of my official duties. (2)
- ❍ No, I do not currently hold a position as an administrator and/or formal teacher leader in my school. (3)

9. While you currently hold an administrative position/title in your school, I am still interested in collecting instances of informal teacher leadership from all educators. Informal teacher leaders are teachers who exhibit leadership behaviors, but who do not hold any official title in their

school. Briefly describe an instance when a colleague did something that you think is indicative of an informal teacher leader.

9. Do you see yourself as a teacher leader?

- ❍ Yes, I see myself as a teacher leader and think this term can accurately be applied to my actions as a teacher. (1)
- ❍ Somewhat, while my actions might be described as leadership, I would not necessarily use the term to describe myself professionally (i.e. teacher leader). (2)
- ❍ No, "leader" is not a term that I would apply to my actions as a teacher. (3)
- ❍ Other (4) _____

10. While you currently hold a formal teacher leadership position/title in your school, could you briefly describe an instance when you did something that you think is indicative of a leadership behavior, but that was not part of your official role as a formal teacher leader or administrator?

11. Informal teacher leaders are teachers who exhibit leadership behaviors, but who do not hold any official leadership title in their school. Briefly describe an instance when a colleague did something that you think is indicative of an informal teacher leader.

9. Teacher leaders are more likely to exhibit the following behaviors, according to Fairman, J. C., & Mackenzie, S. V. (2012). Click any of the behaviors that you have engaged in over the past two years.

- ❑ Experimentation and innovation in the classroom (1)
- ❑ Sharing teaching ideas and approaches with colleagues (2)
- ❑ Extending and deepening your professional knowledge through continuing education for yourself (3)
- ❑ Collaborating with your colleagues to develop new instructional approaches and curricular projects (4)
- ❑ Questioning existing school practices and advocating for school-wide change on important issues (5)
- ❑ Sharing and presenting your work outside of your own school to stimulate change among other teachers (6)
- ❑ Working collaboratively with your colleagues and the school community to influence changes in norms, pedagogical beliefs and practices. (7)
- ❑ Collaborating with students and parents for school improvement efforts (8)
- ❑ I do not believe I have engaged in any of these behaviors over the past two years. (9)

10. If you selected any of the options offered in the previous item,

please provide a brief example for one or two of the behaviors you have engaged in over the past two years.

11. Informal teacher leaders are teachers who exhibit leadership behaviors, but who do not hold any official leadership title in their school. Briefly describe an instance when you did something that you think is indicative of an informal teacher leader.

12. Briefly describe an instance when a colleague did something that you think is indicative of an informal teacher leader.

13. What motivates you to behave in the ways that describe an informal teacher leader? (Check all that apply)

- ❑ To reduce the isolation of working alone in my individual classroom. (1)
- ❑ To gain a greater sense of belonging and investment to my school community (2)
- ❑ To learn more about how my school operates and makes change (3)
- ❑ To infuse my career with more diverse experiences and avoid "burn out" (4)
- ❑ To maintain or improve my status among my colleagues and/or administrators. (5)
- ❑ My colleagues often come to me as a resource (6)
- ❑ I was encouraged by my administrator(s) (7)
- ❑ To improve my teaching (8)
- ❑ To address a problem that I believe was not being addressed (9)
- ❑ Please describe any other motivations that have encouraged you to become a teacher leader. (10) _____

14. Do you see yourself as a teacher leader?

- ❍ Yes, I see myself as a teacher leader and think this term can accurately be applied to my actions as a teacher. (1)
- ❍ Somewhat, while my actions might be described as leadership, I would not necessarily use the term to describe myself professionally (i.e. teacher leader). (2)
- ❍ No, "leader" is not a term that I would apply to my actions as a teacher. (3)
- ❍ Other (4) _____

15. Do you wish to be considered for the interview phase of the study, for the purpose of gathering additional information about informal teacher leaders? Information collected will be used for analysis in a dissertation that seeks to learn more about informal teacher leadership. Interviews will last approximately 1 hour and can be conducted in person, via phone, or through video-conferencing. Interviews will be scheduled at your convenience. All information from the interview will be confidential and data presented in published material will remove identifiable information about participants.

- ❍ Yes, I am willing to participate in a follow-up interview. Please provide your name and email. (Thank you!) (1) _____
- ❍ No, I am not willing to participate in a follow-up interview. (2)

## Appendix B

Interview Protocol

**Part 1**: The first part of this interview is for me to gather some contextual information to better understand your answers later in the interview.

1. Could you describe the school you currently work in, terms of demographics? There is no need to tell me the name of the school.

2. How long have you worked at your current school? Have you worked in any other schools in your teaching career? Could you briefly describe those schools?

**Part 2**: The first part of this interview is about **your conceptions of teacher leaders**. I want to remind you that there are no "right" answers that I am looking for. I am trying to find out *your* understanding of what teacher leadership is.

1. I've mentioned to you that this study is about informal leadership, what is *your* understanding about the difference between a formal teacher leader and an informal teacher leader?

2. Based on your experience, what are the reasons that you or other teachers might call a colleague a teacher leader?

3. I want to ask you about an item on the survey that was about whether you see yourself as a leader. You said X. Can you tell me more about your answer and why you think that?

4. Can you give me examples or share a story that reflects how your understanding of teacher leadership has changed over time?

**Part 3**: The next series of questions are about the skills you think an informal teacher leader should possess and *how* teachers might acquire these skills.

5. Based on your experience, how is the role/skill of being a teacher leader different from your role as a classroom teacher? What skills do you think are necessary to be a successful informal teacher leader?

6. Have you ever attended a workshop or professional development event that inspired or prepared you to be a leader? Please describe that experience.

7. What are the experiences you have had prior to teaching or outside of your role as a teacher that have required you to be a formal or informal leader?

8. Please tell me about any memories you have had when a friend, mentor or family member inspired you to be a leader?

**Part 3**: My next group of questions is about the **motivations** teachers have for leading and the factors that encourage or potentially discourage them from leading.

9. Could you tell me about a problem that has, or would, motivate you to take on an informal teacher leadership role?
    a. How did you (or would you) go about solving that problem?

b. What impact do you think you had on your school community by working on that problem (or might potentially have)?

10. Other than wanting to solve a problem, what are other factors that have motivated or might motivate you to take on a leadership role, without being recognized as an "official" leader?

11. When you think about all of the reasons you have chosen to lead, which one is the most motivating factor?

12. Do you have any plans or hopes of becoming a formal teacher leader or an administrator, at any point in your career?

13. When you are engaging in informal leadership, who are the **PEOPLE** that help you, or encourage you in that role?

14. Who are the **PEOPLE** that sometimes stand in your way or make it more difficult for you lead?

15. Besides the *people* you interact with, are there characteristics of your school culture or ways that your school is structured that **encourage** informal teacher leadership?

16. Besides the *people* you interact with, are there characteristics of your school culture or ways that your school is structured that **discourage** informal teacher leadership?

**Part 4**: This last group of questions is about the specific actions that you take as an informal teacher leader, as well as, what you think is the impact of teacher leadership.

17. I have your survey responses here and I would like to ask you to elaborate on some of the examples that you provided regarding the behaviors that were listed. Here I would pick out responses and inquire more deeply about the examples.

18. If a teacher becomes an informal teacher leader is there the potential for a **negative** impact on her, on students, on her interactions with others in the school, on the teaching profession, or on public education? Do examples of any such possible drawbacks occur to you?

19. If a teacher becomes an informal teacher leader is there the potential for a **positive** impact on her, on students, on her interactions with others in the school, on the teaching profession, or on public education? Do examples of any such possible positive effects occur to you?

Thank you so much. Is there anything that you want to add that I didn't ask or that you wish you could elaborate on?

## Appendix C

Consent for Participation

**Consent for Participation in Interview Research**

I volunteer to participate in a research project conducted by Jennifer Martin from Lesley University. I understand that the project is designed to gather information about teacher leaders for Jennifer Martin's dissertation in Educational leadership. More specifically, this dissertation seeks to find out more about how teachers lead without formal recognized leadership positions.

1. My participation in this project is voluntary. I understand that I will not be paid for my participation. I may withdraw and discontinue participation at any time without penalty. Any questions regarding this study can be directed to the researcher, Jennifer Martin via email at jmarti36@lesley.edu and/or the researcher's faculty advisor, Dr. Paul Naso, at pnaso@lesley.edu.

2. I understand that this research study has been reviewed and approved by the Institutional Review Board (IRB) at Lesley University. There is a Standing Committee for Human Subjects in Research at Lesley University to which complaints or problems concerning any research project may, and should, be reported if they arise. Contact the Committee Chairperson at irb@lesley.edu.

3. I understand that if I feel uncomfortable in any way during the interview session, I have the right to decline to answer any question or to end the interview.

4. The interview will last approximately 1 hour. Notes will be typed during the interview and an audio recording of the interview and subsequent dialogue will be made. If I don't want to be recorded, I will not be able to participate in the study. I understand that all materials including typed notes and audio recordings of this interview will be kept on password-protected devices owned by the researcher.

5. I understand that the researcher will not identify me by name in any reports using information obtained from this interview, and that my confidentiality as a participant in this study will remain secure.

6. I have read and understand the explanation provided to me. I have had all my questions answered to my satisfaction, and I voluntarily agree to participate in this study.

7. I have been given a copy of this consent form.

Signature _____

Printed Name _____

Date _____